



Association of the European  
Two-Wheeler Parts' & Accessories' Industry

# EUROPEAN BICYCLE MARKET

## 2011 edition

### Industry & Market Profile (2010 statistics)



## FOREWORD

This document is the third edition of the European Industry & Market Profile, an economic study carried out by **COLIBI**, *the Association of the European Bicycle Industry* and **COLIPED**, *the Association of the European Two-Wheeler Parts' & Accessories' Industry*.

The document is based on figures provided by our member associations and data kindly put at our disposal by non-member countries.

It gives an overview of the European bicycle industry's activities (production and employment), relevant market data (sales) and highlights the economic bicycle activity in the member countries.

We wish to extend our sincere thanks to our member associations, the European bicycle manufacturers associations, the Chambers of Commerce and Embassies for their valuable and much appreciated contribution in the compilation of this work.

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## BACKGROUND

**COLIBI** is the Association of the European Bicycle Industry; **COLIPED** is the Association of the European Two-Wheeler Parts' & Accessories' Industry.

The aim of the European associations is to promote the common interests of the European bicycle and bicycle parts' & accessories' industries.

**COLIBI** and **COLIPED** are the official spokespersons of the relevant European industry. As such, they keep in regular contact with European policy makers, European bicycle trade and cyclists' associations, the European standardization body CEN, the industry, mobility experts and the press.

**COLIBI and COLIPED** campaign for:

- the appointment of a European Bicycle Officer within the European Commission. COLIBI & COLIPED launched this idea and presented it to the EC in 2007. Since then, this initiative has been supported by several national and international associations, among them also the ECF and ETRA;
- fair trade and the fight of unfair practices in view of safeguarding the European bicycle industry;
- the application of a reduced VAT rate on all bicycle products and services;
- a better recognition of the (potential of the) bicycle and cycling in European policies and the development of a bicycle (cycling) strategy by European policy makers;
- the introduction at European level of reliable and comparable statistics related to cycle infrastructure, costs & benefits of cycle use, traffic accidents, etc.;
- a better and easier access to European funding and financial means;
- the introduction in the allocation of European funding of effective criteria that serve sustainability;
- an increased cycle usage throughout the EU and beyond;
- etc...

The European associations fully support the European (EN) safety standards for bicycles.

**COLIBI & COLIPED** have a Liaison status with CEN TC 333 'Cycles' and are member of the Global Alliance for EcoMobility.

To promote the European bicycle parts' & accessories' industry, **COLIPED** annually organizes a joint European participation in the Taipei Cycle Show (Taiwan). Initiated in 1993, the joint European booth has known an ever increasing success. In 2011, 28 European bicycle parts' & accessories' manufacturers participated in the joint European COLIPED booth, which occupied a total surface of 783 m<sup>2</sup>.

Our members are the national bicycle industry associations in 13 different countries: Austria, Belgium, Bulgaria, Denmark, Germany, Great Britain, Finland, France, Hungary, Italy, the Netherlands, Poland and Turkey.



## THE EUROPEAN BICYCLE INDUSTRY

20,000,000 bicycles are sold annually across Europe. This total exceeds that of any other means of mobility (cars, motorcycles etc.).

On average, European citizens own more bicycles than any other means of transport.

Via their national associations, **all major players on the European bicycle market** are represented within COLIBI & COLIPED.

The bicycle is:

- the most environmentally friendly, energy efficient and sustainable means of mobility;
- the cheapest means of mobility (no ownership- motorway or registration taxes, no insurances, no driving license or parking costs and no high service maintenance costs);
- the most healthy and social means of mobility;
- the most time-saving and silent mode in urban areas;
- the most accessible mode of transport;
- simply the best mobility mode in urban areas.



*"COLIBI represents the European bicycle producers. The EU bicycle industry is characterized by its modern automation, its use of high-tech materials such as carbon fibers, special alloys and very light metals. Without any doubt, the high quality of the EU produced bicycles stimulates cycle usage and enhances the whole cycling movement and cycling culture in Europe.*

*For our customers it is important that the production of mainly medium to high-end bicycles is realized near the European home market. This way, deliveries can be more flexible as the produced series can be smaller and lead times can be shorter.*

*The EU bicycle industry is spread over the whole EU territory, with 250 small and medium-sized bicycle producers. Thanks to the regionalism of our 'green' industry, CO2 emissions caused by the transport of the bicycles are reduced to almost zero!*

*The EU bicycle industry is seen as the best and most innovative in the world. By continuously striving to improve the quality of our products by R&D and by making further investments, this image can only be strengthened".*

**René TAKENS –COLIBI President**



*"Since many years, COLIPED promotes the European bicycle parts' industry. Our presence at the Taipei Cycle Show with our joint European booth contributes to the diffusion of the European bicycle parts worldwide.*

*The last years have been extremely difficult for all industries, but we are very proud to say that the European bicycle parts' industry is keeping its leading position and this is the result of continuous innovation, great knowledge of sophisticated technologies and huge investments in design and R&D.*

*The close co-operation with the cycling sport movement (which we confirmed by joining the WFSGI), our strong commitment to listen carefully to the needs of consumers, and our convinced devotion to all bicycle advocacy movements are the inspiring policies which we will adopt more and more in future years. For this reason COLIPED, together with COLIBI, has been taking part in the International Transport Forum in Leipzig.*

*We will be dedicating time and resources to these very important initiatives which will shape the world of tomorrow at transport/mobility level".*

**Moreno FIORAVANTI – COLIPED President**

## THE COLIBI & COLIPED MEMBERS



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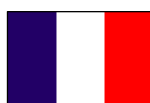
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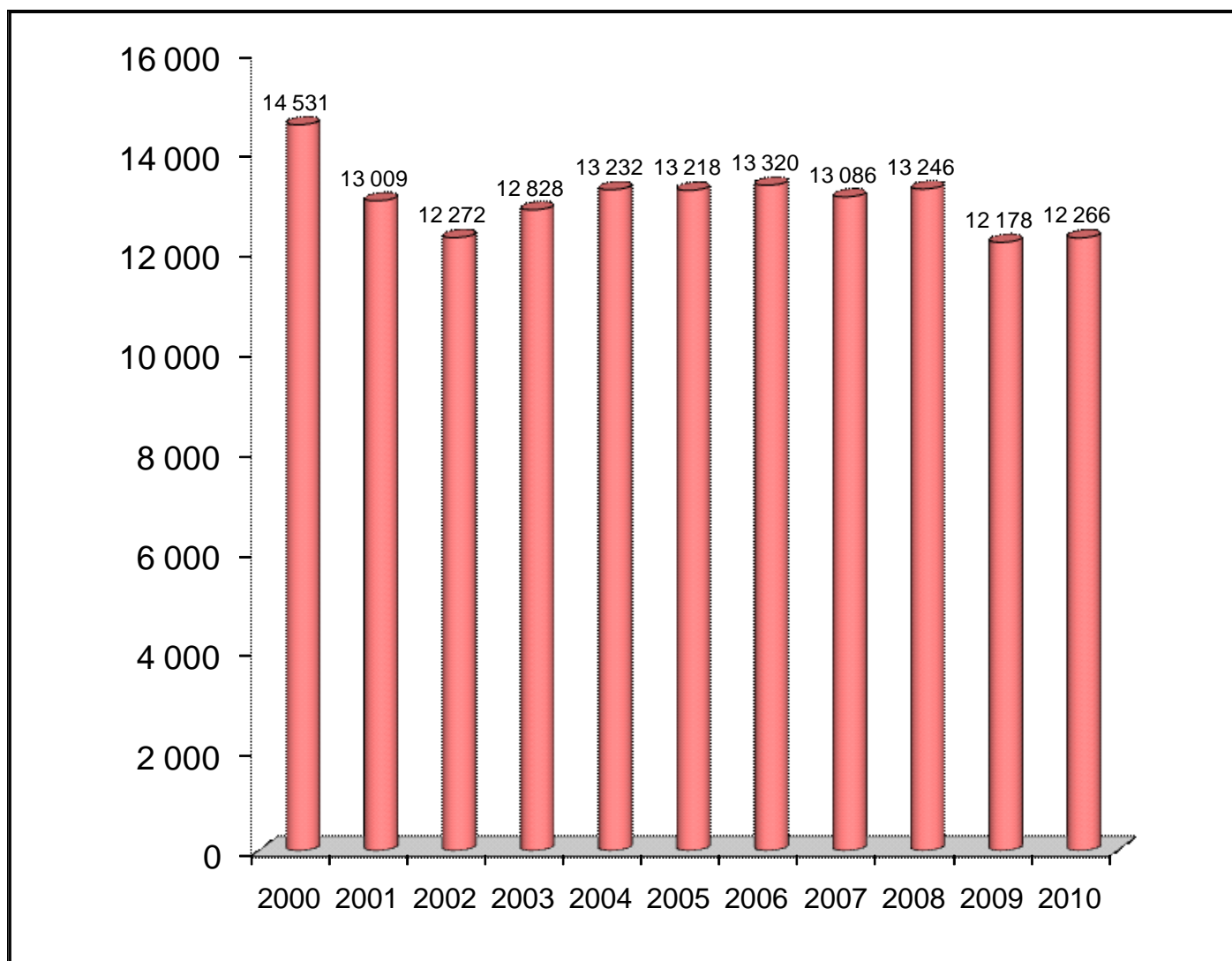
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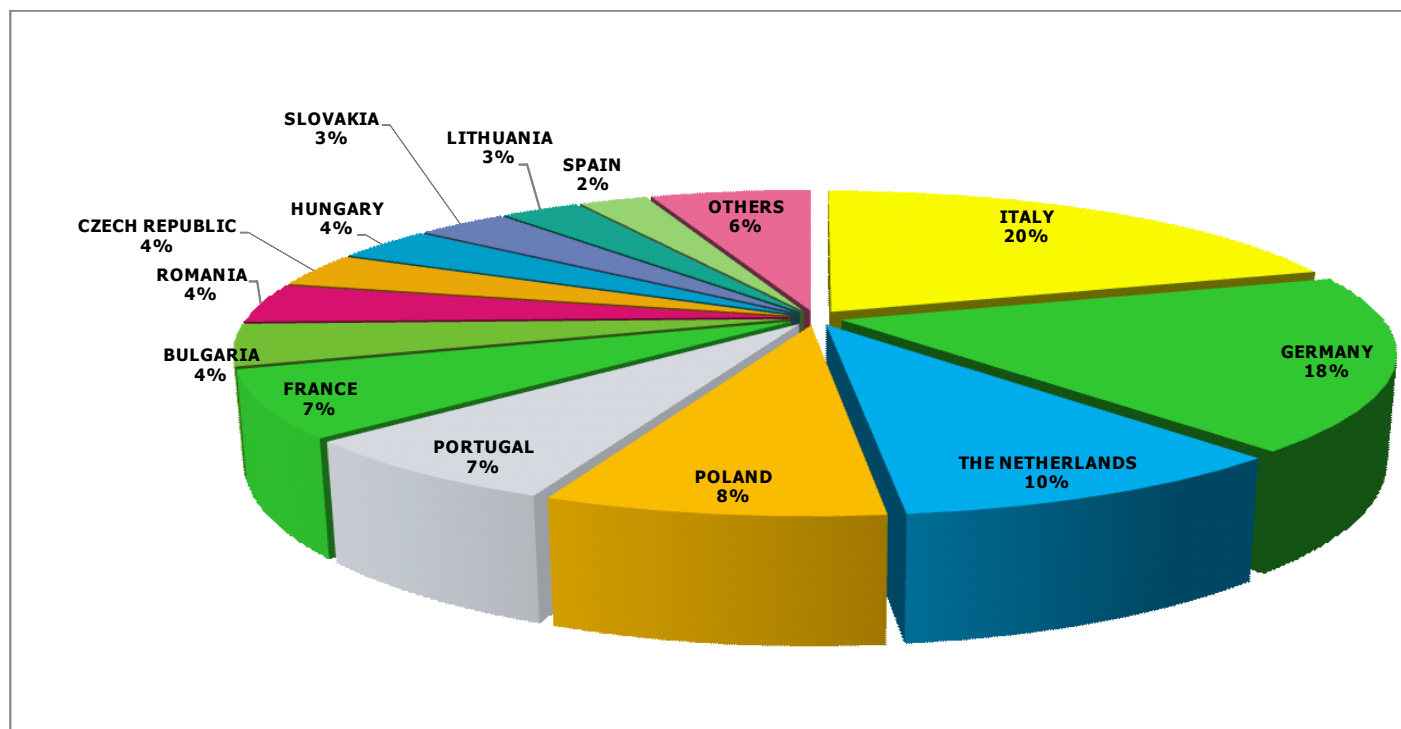
# EUROPEAN BICYCLE PRODUCTION

## EUROPEAN BICYCLE PRODUCTION (EU 27) (1,000 units) 2000 – 2010



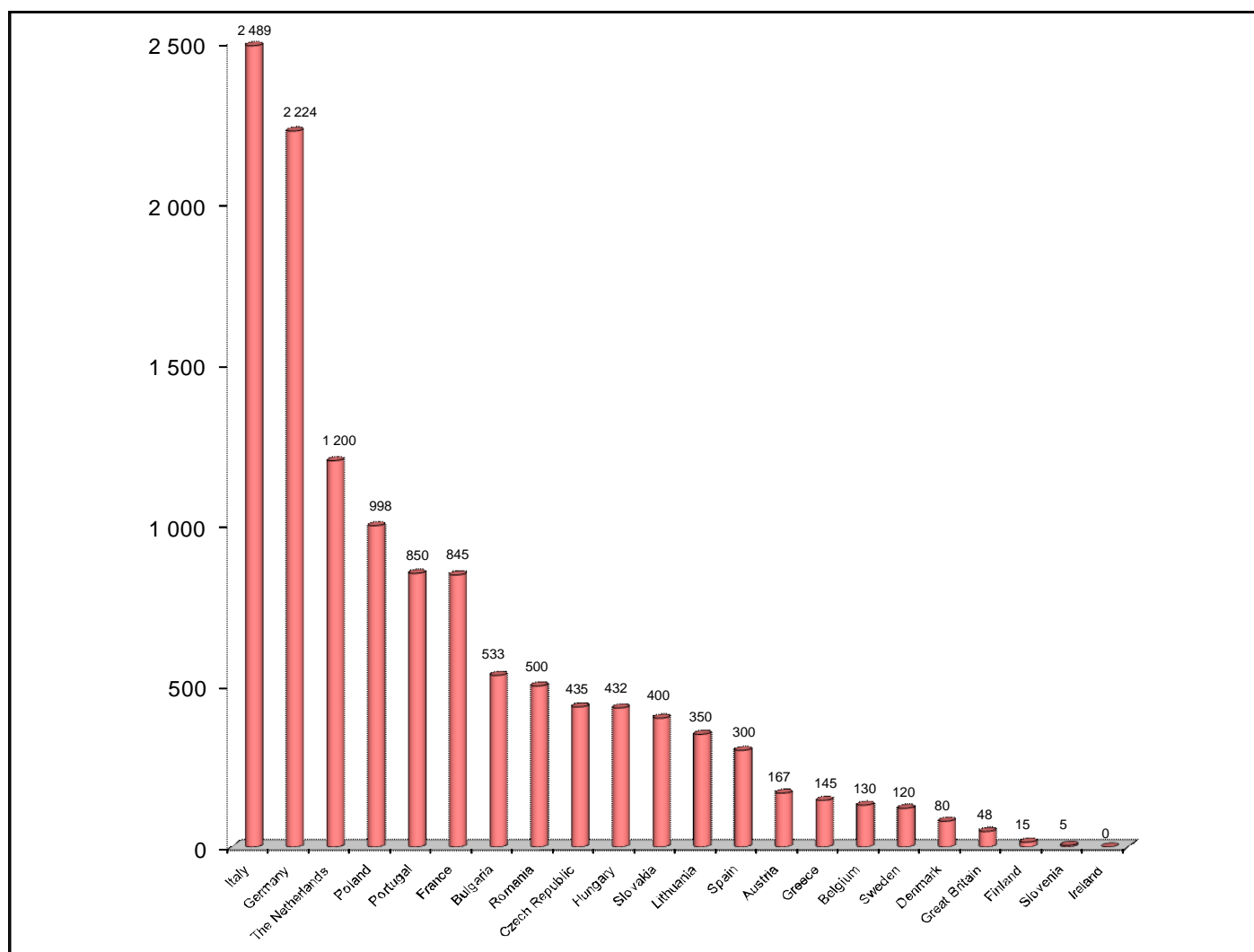
Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	14,531	13,009	12,272	12,828	13,232	13,218	13,320	13,086	13,246	12,178	12,266
Evolution year/year-1 (%)		-10.47	-5.67	4.53	3.15	-0.11	0.77	-1.76	1.22	-8.06	0.72

## 2010 EUROPEAN BICYCLE PRODUCTION (EU 27) (1,000 units)



Country	Italy	Germany	The Netherlands	Poland	Portugal	France	Bulgaria	Romania	Czech Republic	Hungary	Slovakia	Lithuania	Spain	Austria	Greece	Belgium	Sweden	Denmark	Great Britain	Finland	Slovenia	Ireland	Cyprus	Estonia	Latvia	Luxembourg	Malta	EU 27
Bicycle Production (x 1,000)	2,489	2,224	1,200	998	850	845	533	500	435	432	400	350	300	167	145	130	120	80	48	15	5	0	0	0	0	0	0	12,266
Country share %	20.29	18.13	9.78	8.14	6.93	6.89	4.35	4.08	3.55	3.52	3.26	2.85	2.45	1.36	1.18	1.06	0.98	0.65	0.39	0.12	0.04	0.00	0.00	0.00	0.00	0.00	0.00	100

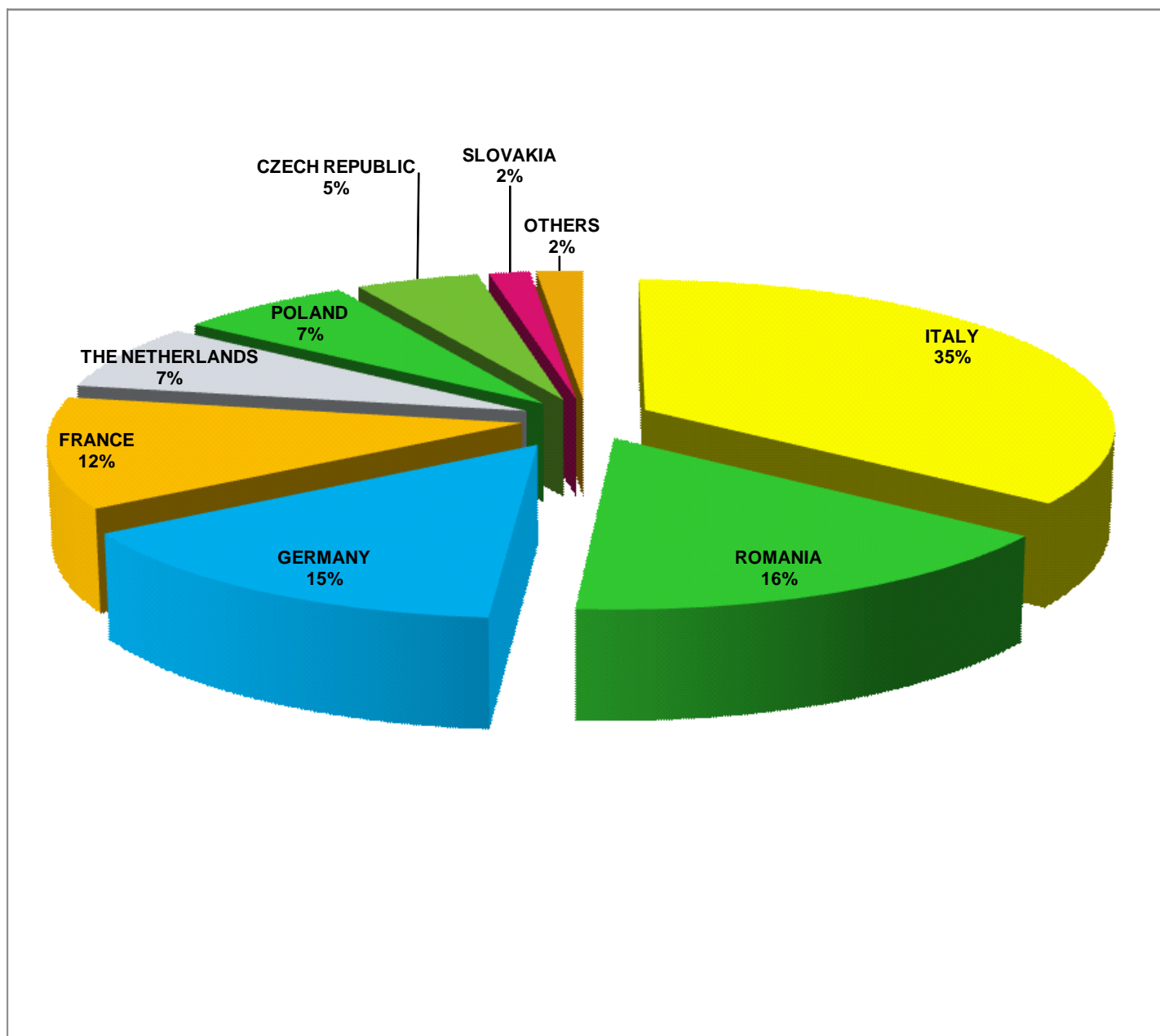
## 2010 EUROPEAN BICYCLE PRODUCTION (EU 27) COUNTRY RANKING (1,000 units)



Country	Italy	Germany	The Netherlands	Poland	Portugal	France	Bulgaria	Romania	Czech Republic	Hungary	Slovakia	Lithuania	Spain	Austria	Greece	Belgium	Sweden	Denmark	Great Britain	Finland	Slovenia	Ireland	Cyprus	Estonia	Latvia	Luxembourg	Malta	EU 27
Bicycle Production (x 1,000)	2,489	2,224	1,200	998	850	845	533	500	435	432	400	350	300	167	145	130	120	80	48	15	5	0	0	0	0	0	0	12,266
Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22						

# EUROPEAN BICYCLE PARTS AND ACCESSORIES PRODUCTION

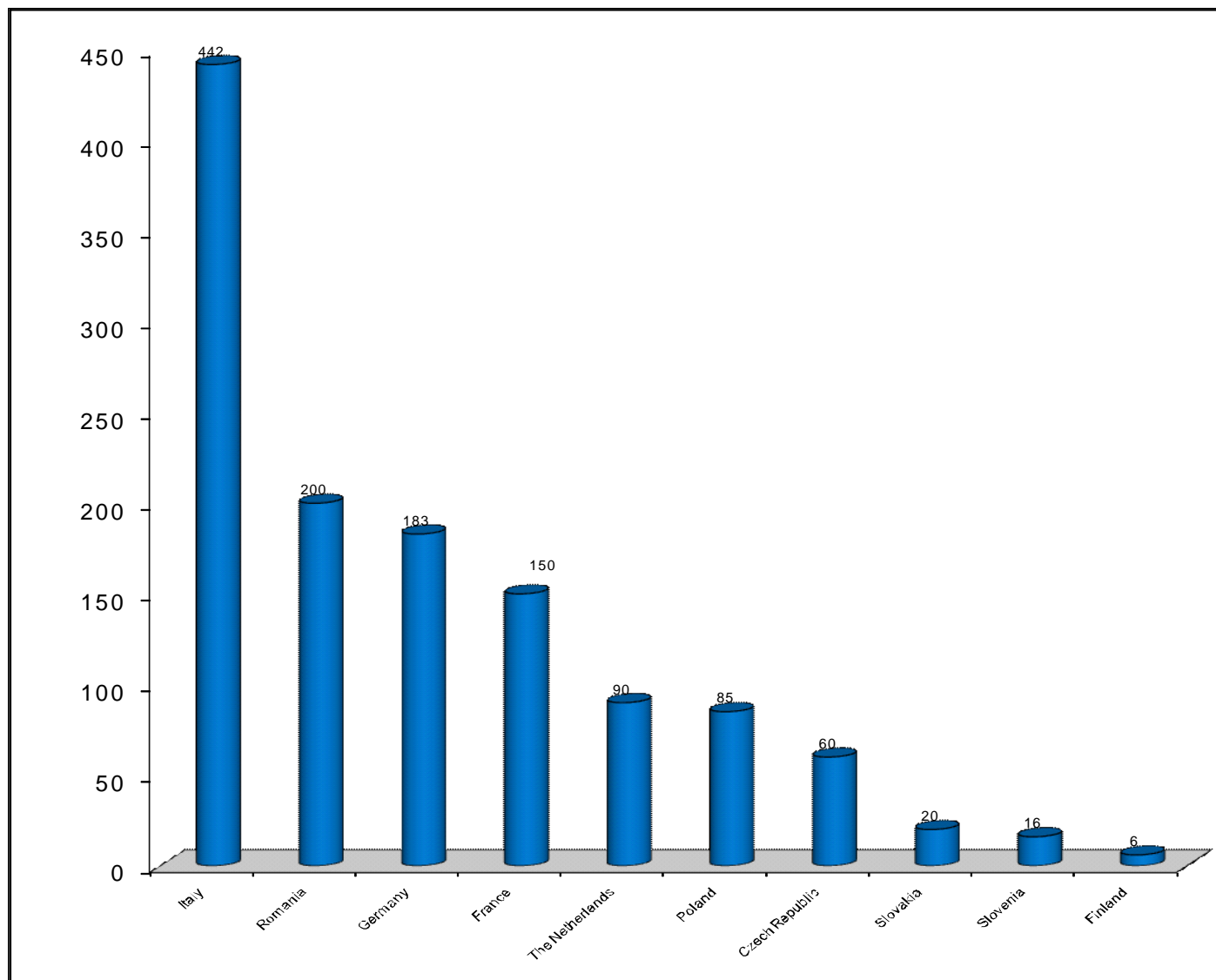
# 2010 EUROPEAN BICYCLE PARTS & ACCESSORIES PRODUCTION (M€) - EU 27



Country	Italy	Romania	Germany	France	The Netherlands	Poland	Czech Republic	Slovakia	Slovenia	Finland	Bulgaria	Cyprus	Estonia	Greece	Ireland	Latvia	Lithuania	Luxembourg	Malta	Sweden	Portugal	Belgium	Spain	Great Britain	Hungary	Austria	Denmark	EU 27	
P & A Production (M€)	442	200	183	150	90	85	60	20	16	6	1																		1,253
Country Share %	35	16	15	12	7	7	5	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	100	

**Comments : VALUES EXCLUDING VAT**

## 2010 EUROPEAN BICYCLE PARTS & ACCESSORIES PRODUCTION (EU 27) COUNTRY RANKING (M€)

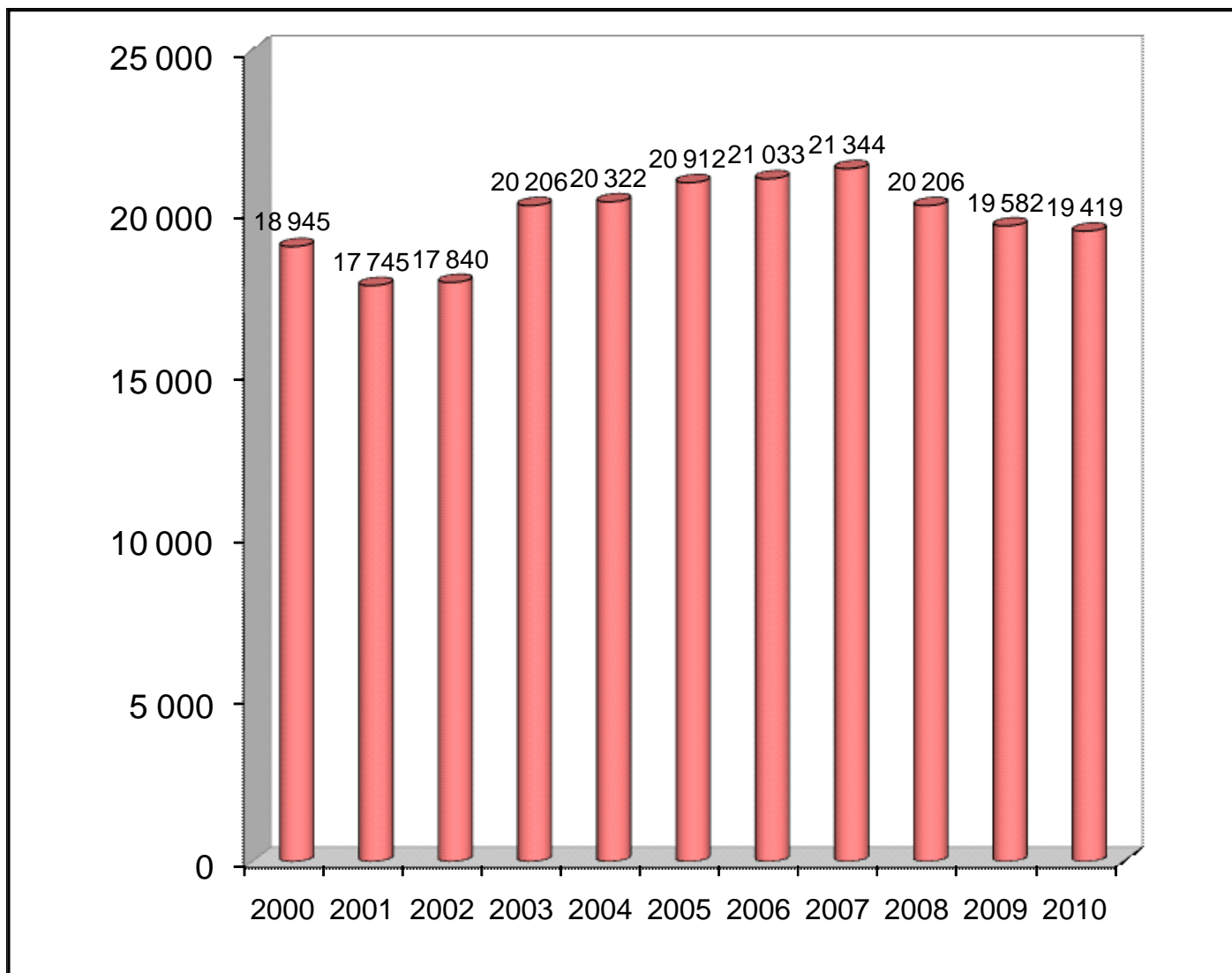


Country	Italy	Romania	Germany	France	The Netherlands	Poland	Czech Republic	Slovakia	Slovenia	Finland	Bulgaria	Cyprus	Estonia	Greece	Ireland	Latvia	Lithuania	Luxembourg	Malta	Sweden	Portugal	Belgium	Spain	Great Britain	Hungary	Austria	Denmark	EU 27
P & A Production (M€)	442	200	183	150	90	85	60	20	16	6	1																	1,253
Ranking	1	2	3	4	5	6	7	8	9	10																		

**Comments : VALUES EXCLUDING VAT**

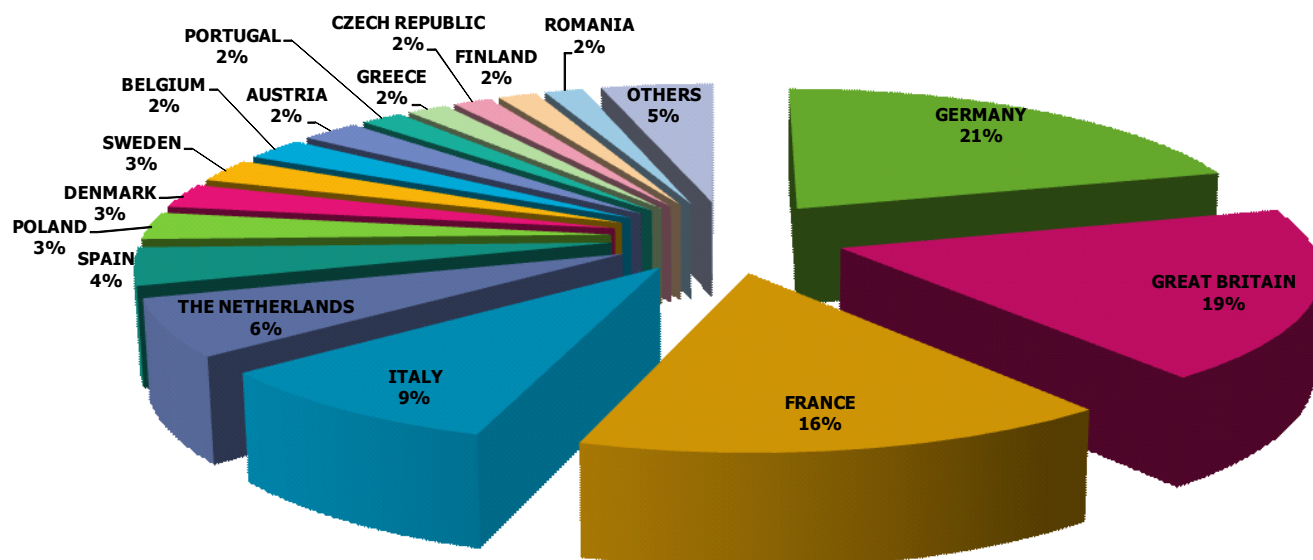
# EUROPEAN BICYCLE SALES

## EUROPEAN BICYCLE SALES (EU 27) (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	18,945	17,745	17,840	20,206	20,322	20,912	21,033	21,344	20,206	19,582	19,419
Evolution (%)		-6.33	0.54	13.26	0.57	2.90	0.58	1.48	-5.33	-3.09	-0.83

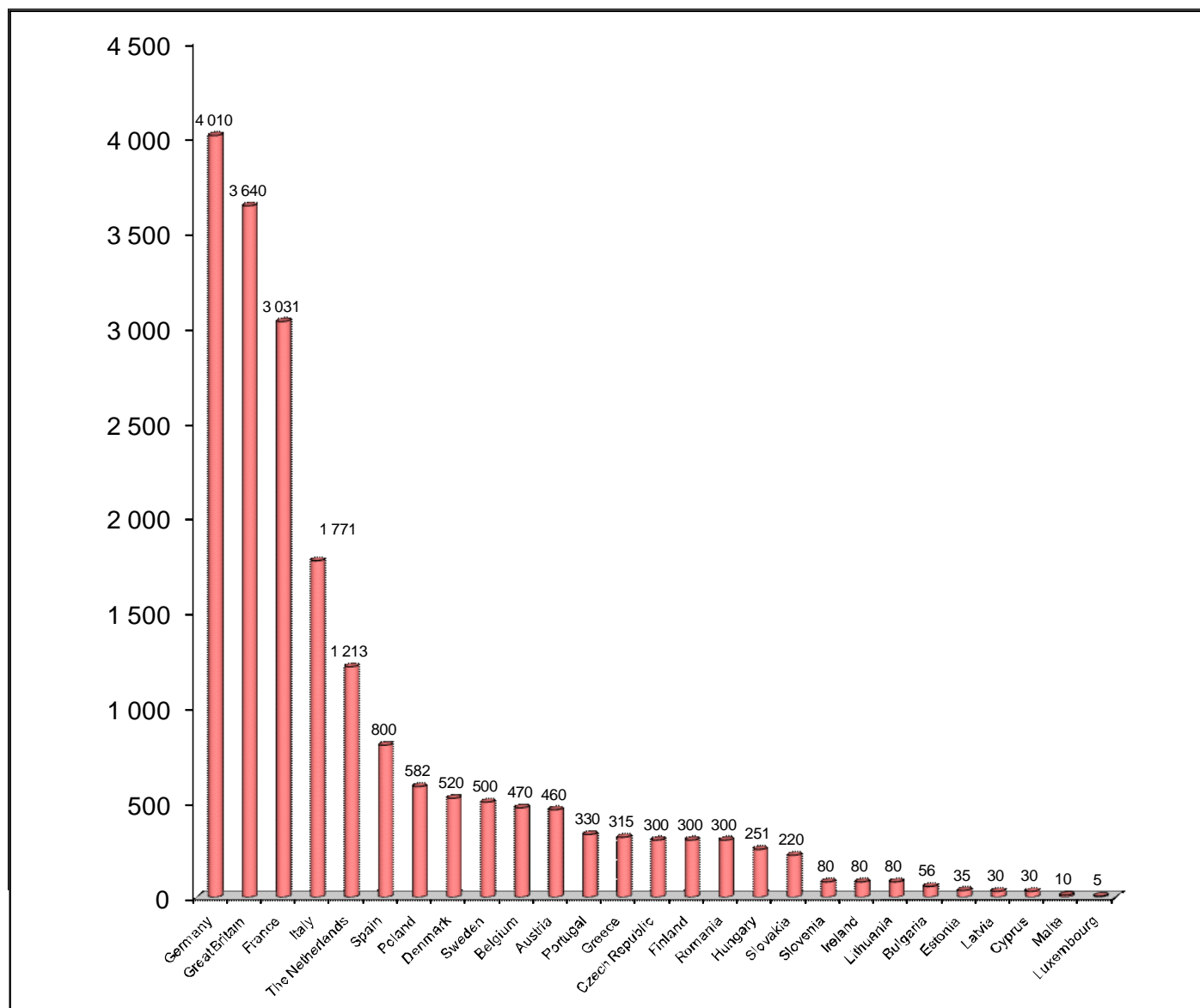
## 2010 EUROPEAN BICYCLE SALES (EU 27) (1,000 units)



Country	Germany	Great Britain	France	Italy	The Netherlands	Spain	Poland	Denmark	Sweden	Belgium	Austria	Portugal	Greece	Czech Republic	Finland	Romania	Hungary	Slovakia	Slovenia	Ireland	Lithuania	Bulgaria	Estonia	Latvia	Cyprus	Malta	Luxembourg	EU 27
Bicycle Sales (x 1,000)	4,010	3,640	3,031	1,771	1,213	800	582	520	500	470	460	330	315	300	300	300	251	220	80	80	80	56	35	30	30	10	5	19,419
Country share (%)	21	19	16	9	6	4	3	3	3	2	2	2	2	2	2	2	1	1	0	0	0	0	0	0	0	0	0	100

**Comments : SALES = SALES TO CONSUMERS**

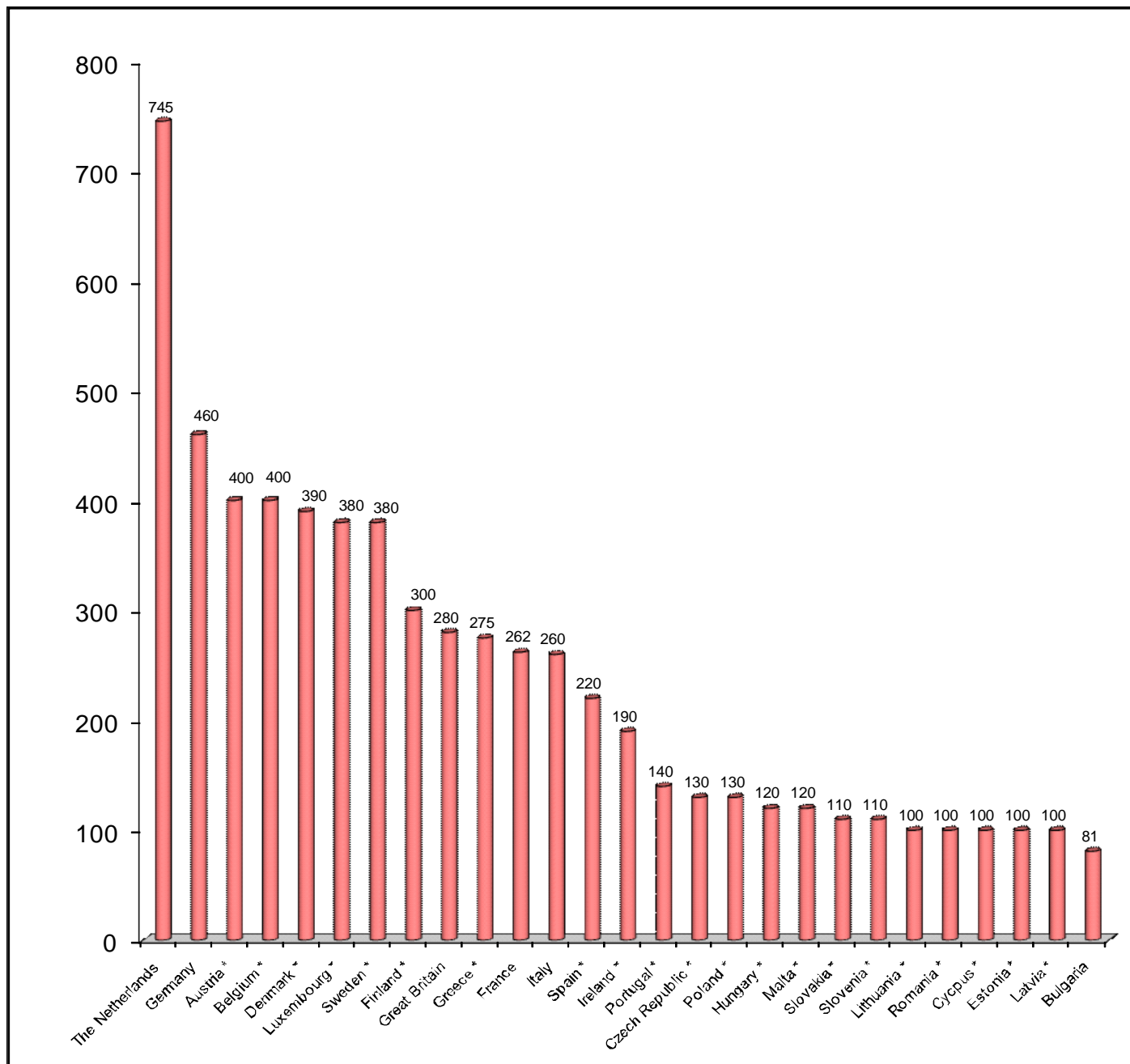
## 2010 EUROPEAN BICYCLE SALES (EU 27) COUNTRY RANKING (1,000 units)



Country	Germany	Great Britain	France	Italy	The Netherlands	Spain	Poland	Denmark	Sweden	Belgium	Austria	Portugal	Greece	Czech Republic	Finland	Romania	Hungary	Slovakia	Slovenia	Ireland	Lithuania	Bulgaria	Estonia	Latvia	Cyprus	Malta	Luxembourg	EU 27
Bicycle Sales (x 1,000)	4,010	3,640	3,031	1,771	1,213	800	582	520	500	470	460	330	315	300	300	300	251	220	80	80	80	56	35	30	30	10	5	19,419
Ranking	1	2	3	4	5	6	7	8	9	10	11	12	13	14	14	14	17	18	19	19	19	22	23	24	24	26	27	100

**Comments : SALES = SALES TO CONSUMERS**

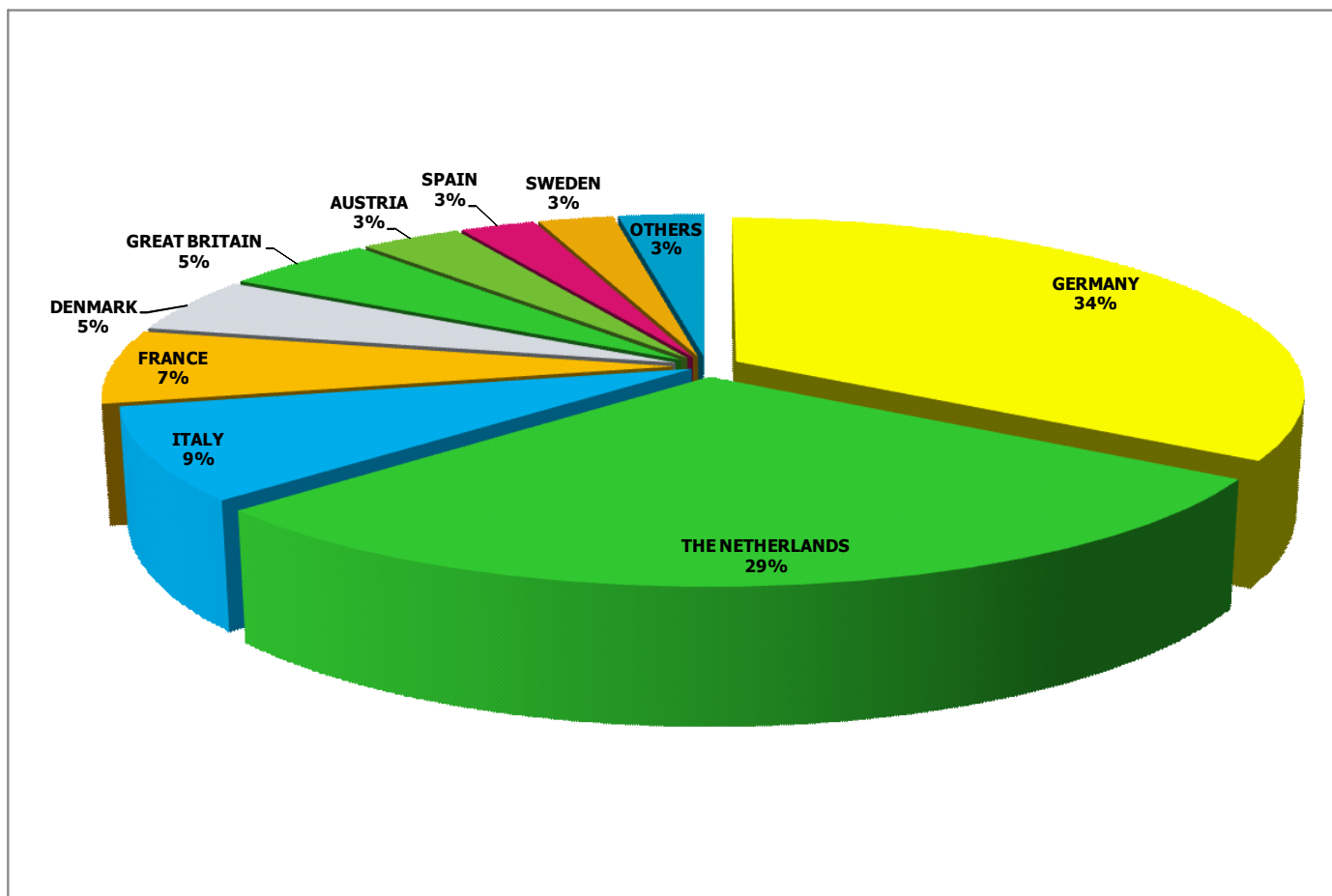
## 2010 EUROPEAN BICYCLE SALES (EU 27) AVERAGE PRICE/COUNTRY (€)



Country	The Netherlands	Germany	Austria *	Belgium *	Denmark *	Luxembourg *	Sweden *	Finland *	Great Britain	Greece *	France	Italy	Spain *	Ireland *	Portugal *	Czech Republic *	Poland *	Hungary *	Malta *	Slovakia *	Slovenia *	Lithuania *	Romania *	Cyprus *	Estonia *	Latvia *	Bulgaria	EU 27
Average price (€)	745	460	400	400	390	380	380	300	280	275	262	260	220	190	140	130	130	120	120	110	110	100	100	100	100	100	81	

**Comments : AVERAGE PRICES INCLUDE VAT**

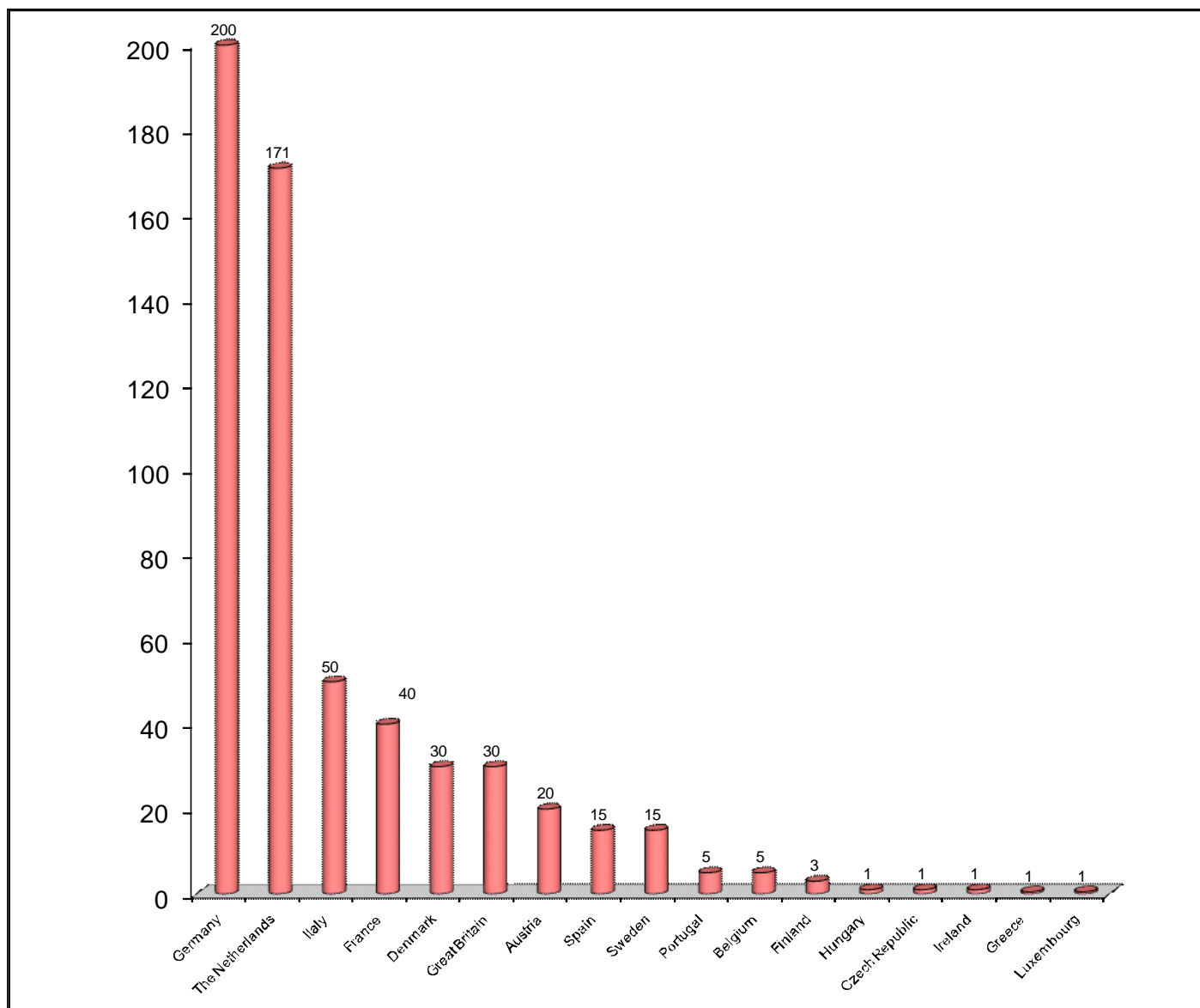
## 2010 EUROPEAN EPAC SALES (EU 27) (1,000 units)



Country	Germany	The Netherlands	Italy	France	Denmark	Great Britain	Austria	Spain	Sweden	Portugal	Belgium	Finland	Hungary	Czech Republic	Ireland	Greece	Luxembourg	Lithuania	Bulgaria	Poland	Romania	Slovakia	Slovenia	Cyprus	Estonia	Latvia	Malta	EU 27	
EPAC Sales (x 1,000)	200	171	50	40	30	30	20	15	15	5	5	3	1	1	1	1	1	0	0	0									588
Country share %	34.01	29.08	8.50	6.80	5.10	5.10	3.40	2.55	2.55	0.85	0.85	0.51	0.17	0.17	0.17	0.09	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100	

**Comments : EPAC = Electric Power-Assisted Cycle**

## 2010 EUROPEAN EPAC SALES (EU 27) COUNTRY RANKING (1,000 units)

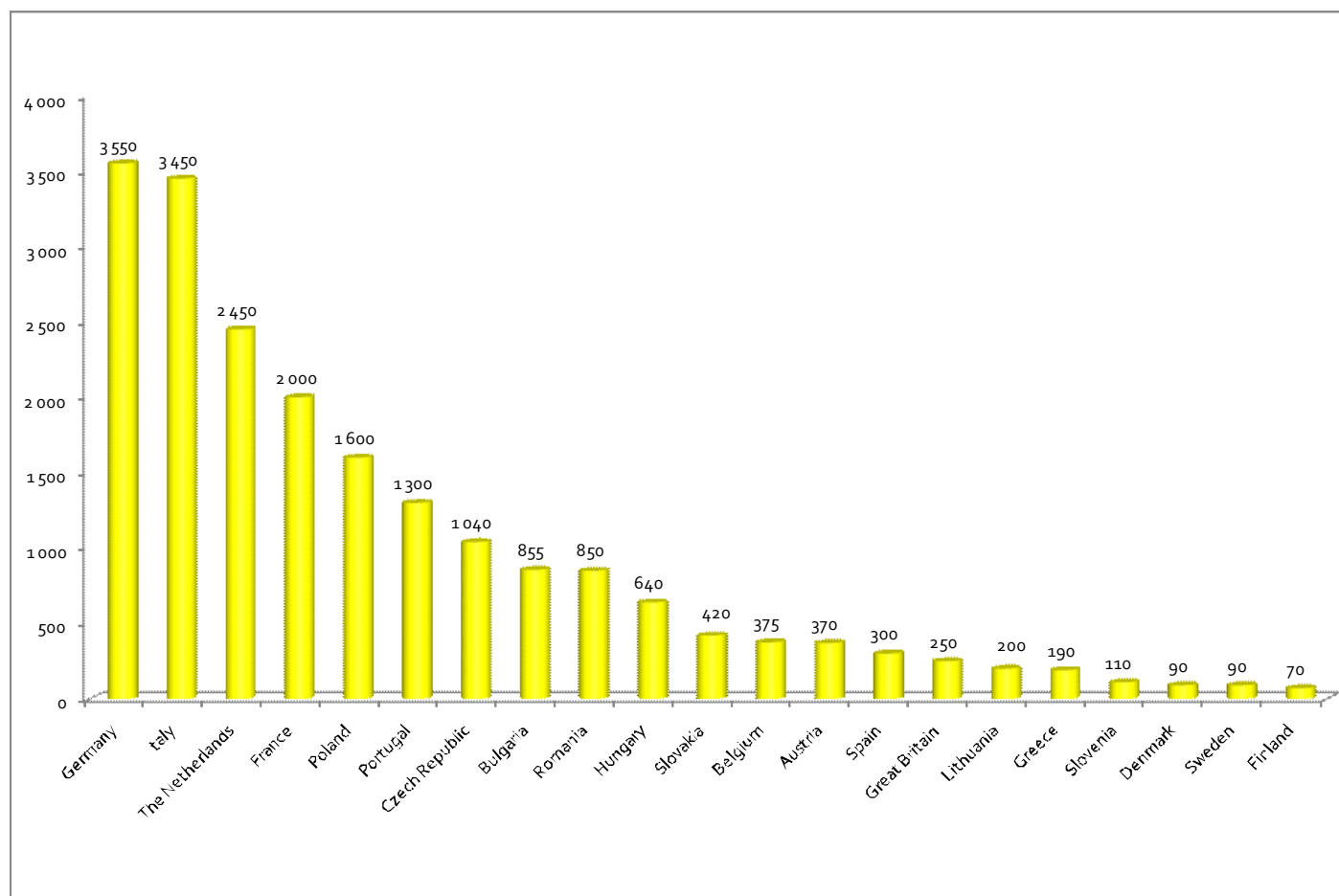


Country	Germany	The Netherlands	Italy	France	Denmark	Great Britain	Austria	Spain	Sweden	Portugal	Belgium	Finland	Hungary	Czech Republic	Ireland	Greece	Luxembourg	Lithuania	Bulgaria	Poland	Romania	Slovakia	Slovenia	Cyprus	Estonia	Latvia	Malta	EU 27
EPAC Sales (x 1,000)	200	171	50	40	30	30	20	15	15	5	5	3	1	1	1	1	1											588
Ranking	1	2	3	4	5	5	7	8	8	10	10	12	13	13	13	16	16											100

**Comments : EPAC = Electric Power-Assisted Cycle**

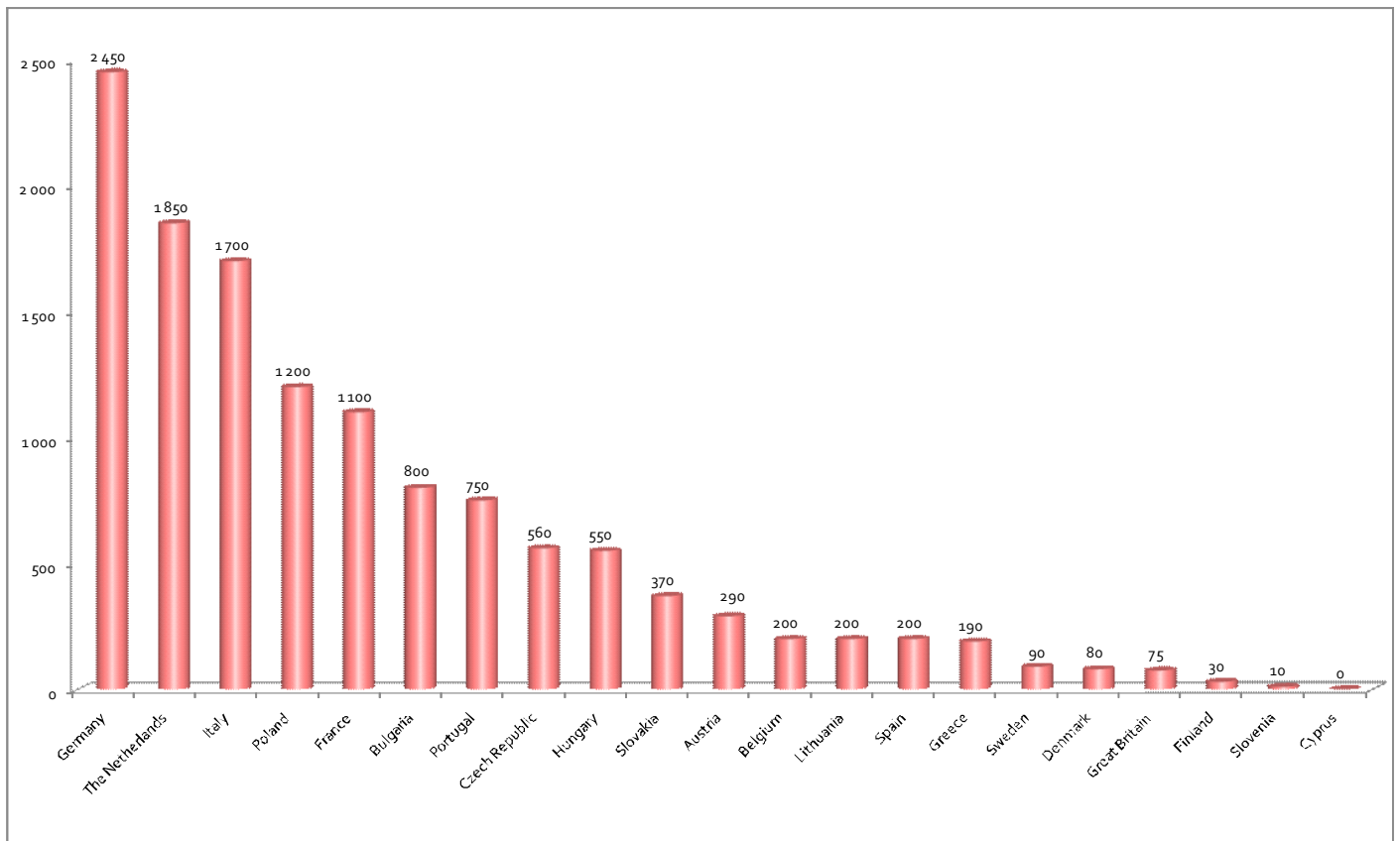
# 2010 EUROPEAN BICYCLE INDUSTRY EMPLOYMENT

## 2010 EMPLOYMENT IN THE EUROPEAN BICYCLE AND BICYCLE PARTS & ACCESSORIES INDUSTRIES (EU27)



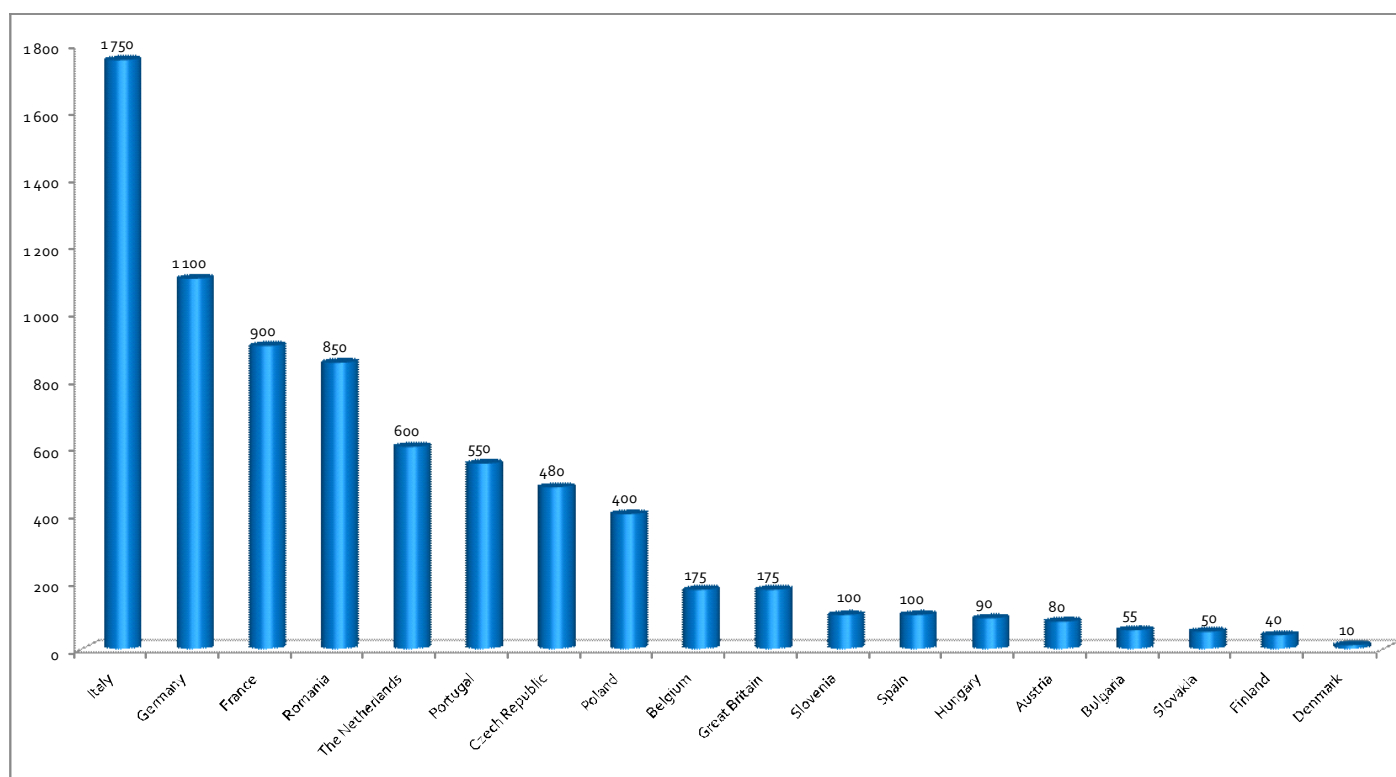
Country	Germany	Italy	The Netherlands	France	Poland	Portugal	Czech Republic	Bulgaria	Romania	Hungary	Slovakia	Belgium	Austria	Spain	Great Britain	Lithuania	Greece	Slovenia	Denmark	Sweden	Finland	Cyprus	Estonia	Ireland	Latvia	Luxembourg	Malta	EU 27
Bicycle Employment	2,450	1,700	1,850	1,100	1,200	750	560	800		550	370	200	290	200	75	200	190	10	80	90	30	0	0	0	0	0	0	12,695
Parts & Accessories Employment	1,100	1,750	600	900	400	550	480	55	850	90	50	175	80	100	175	0	0	100	10	0	40	0	0	0	0	0	0	7,505
Total	3,550	3,450	2,450	2,000	1,600	1,300	1,040	855	850	640	420	375	370	300	250	200	190	110	90	90	70	0	0	0	0	0	0	20,200

## 2010 EUROPEAN BICYCLE INDUSTRY EMPLOYMENT (EU 27)



Country	Germany	The Netherlands	Italy	Poland	France	Bulgaria	Portugal	Czech Republic	Hungary	Slovakia	Austria	Belgium	Lithuania	Spain	Greece	Sweden	Denmark	Great Britain	Finland	Slovenia	Cyprus	Estonia	Ireland	Latvia	Luxembourg	Malta	Romania	EU
Bicycle Industry Employment	2,450	1,850	1,700	1,200	1,100	800	750	560	550	370	290	200	200	200	190	90	80	75	30	10	0	0	0	0	0	0	0	12,695
Ranking	1	2	3	4	5	6	7	8	9	10	11	12	12	12	15	16	17	18	19	20	21							

## 2010 EUROPEAN BICYCLE PARTS AND ACCESSORIES INDUSTRY EMPLOYMENT (EU 27)

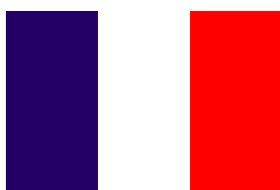


Country	Italy	Germany	France	Romania	The Netherlands	Portugal	Czech Republic	Poland	Belgium	Great Britain	Slovenia	Spain	Hungary	Austria	Bulgaria	Slovakia	Finland	Denmark	Cyprus	Estonia	Greece	Ireland	Latvia	Lithuania	Luxembourg	Malta	Sweden	EU 27
P & A Industry Employment	1,750	1,100	900	850	600	550	480	400	175	175	100	100	90	80	55	50	40	10	0	0	0	0	0	0	0	0	0	7,505
Ranking	1	2	3	4	5	6	7	8	9	9	11	11	13	14	15	16	17	18	19	19	19	19	19	19	19	19	19	

# FRANCE/GERMANY/GREAT BRITAIN/ ITALY/THE NETHERLANDS

## Industry & Market Profile 2000-2010

# France



## 2010 FRENCH CYCLE MARKET : “Mobility bicycle sales are still increasing French specialist dealers are the first economic actors “

The 2010 Cycle sales (bikes + Components and accessories) represent a turnover of 1,280 M€  
3,031,300 bikes were sold in 2010 for a total value of 794 million Euros.  
Sales dropped by -3.5% in volume and value compared to 2009.

- ATB (adults and junior) represent 47% of the total with 1,420 million units.
- Junior Bikes (except ATB): 517,700 units.
- Hybrids: 412,500 units.
- City and Folding Bikes: 237,500 units.
- Racing bikes: 166,300 units.
- Kids' Bikes: 122,700 units.
- BMX: 116,300 units.
- 40,000 EPACs were sold in 2010, compared to 23,700 in 2009.  
(EPAC = Electric Power-Assisted Cycle)

The **MOBILITY** Bicycle market (city bikes, folding bikes and EPACs) is steadily growing and represents 27% of the sales (17% in 2000).

The **LEISURE** Bicycle market (ATB, Hybrids and Junior bikes) is decreasing but keeps the major share with 63% (73% in 2000).

The **SPORTS** Bicycle segment (Racing Bikes, ATB and BMX competition ranges) is stable with a 10% share of the total sales.

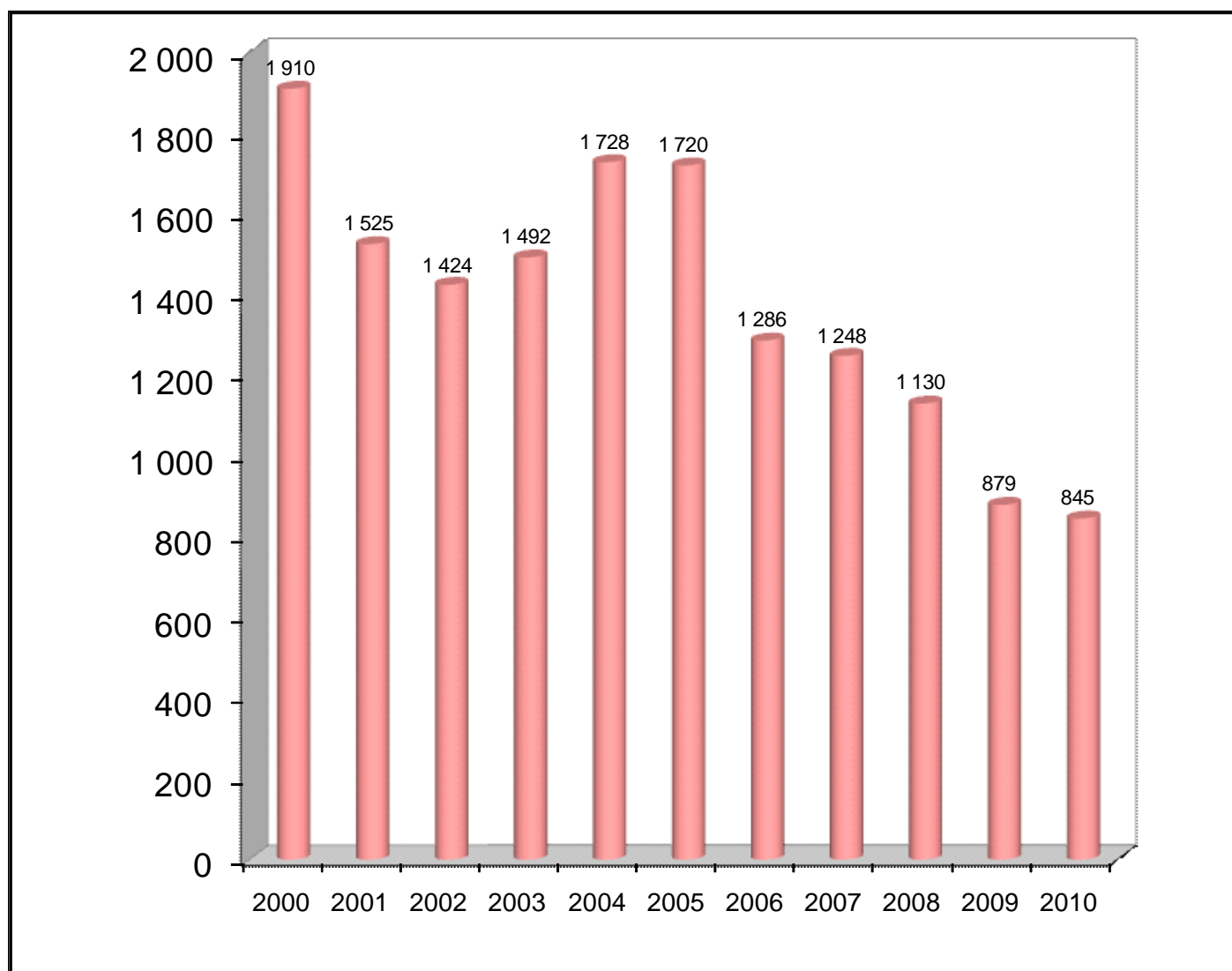
The value of the after sales market components and accessories amounts to 486 M€ (-4%)

Distribution networks' activity (Bicycles + Components and Accessories):

- Specialist dealers represent 51.5% of the total sales' value.
- Sports' Chains manage 38.5% of the total sales' value.
- Mass Merchants manage 10% of the total sales' value.

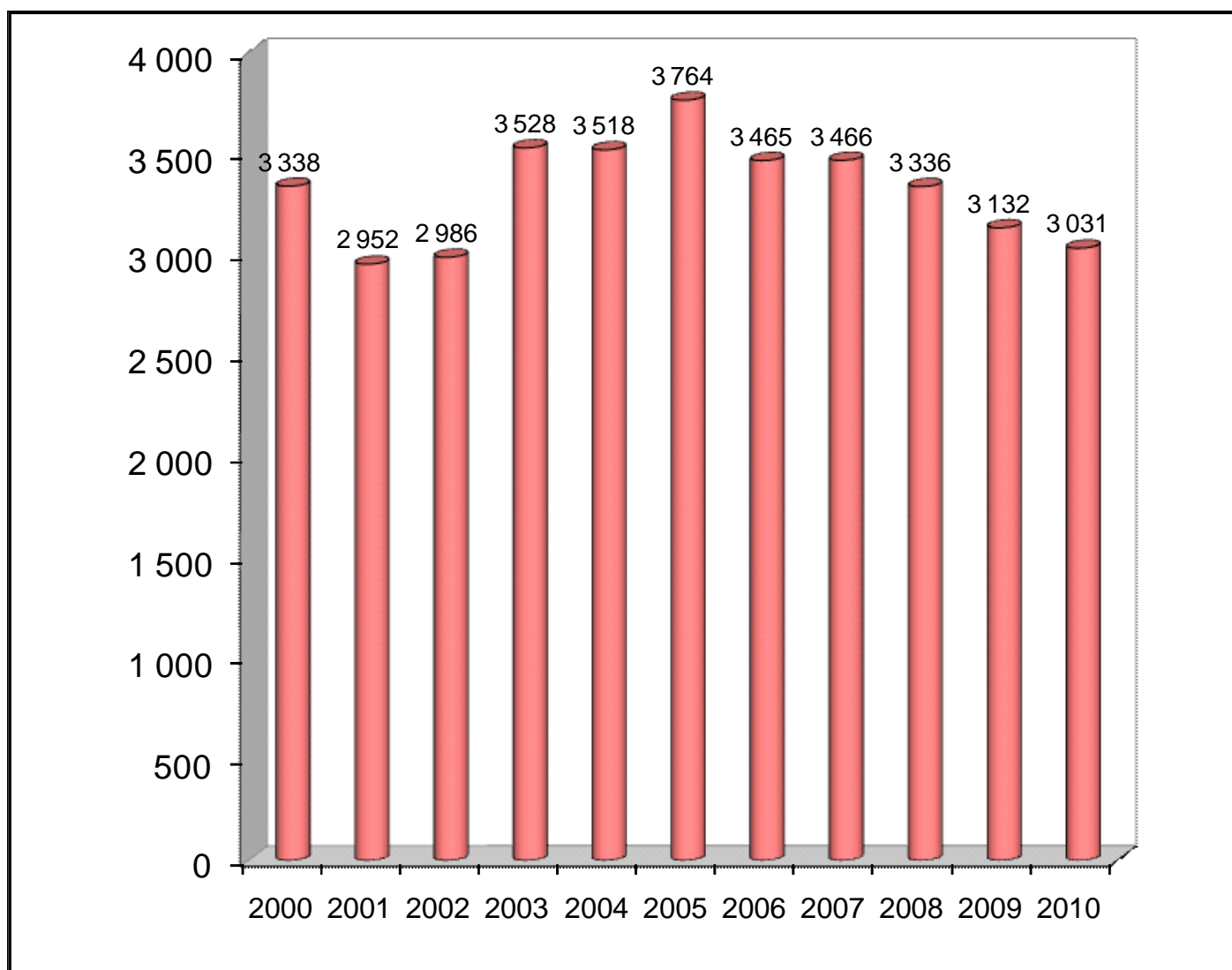
The French Cycle Manufacturers and Traders Council is the meeting point of all professional cycle actors in France: bicycle manufacturers, cycle components and accessories producers, distributors of bicycles, brand equipments and accessories and all actors in favour of the promotion of the bicycle.

## FRANCE - BICYCLE PRODUCTION (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	1,910	1,525	1,424	1,492	1,728	1,720	1,286	1,248	1,130	879	845
Evolution year/year-1 (%)		-20.16	-6.62	4.78	15.82	-0.46	-25.23	-2.95	-9.46	-22.21	-3.87

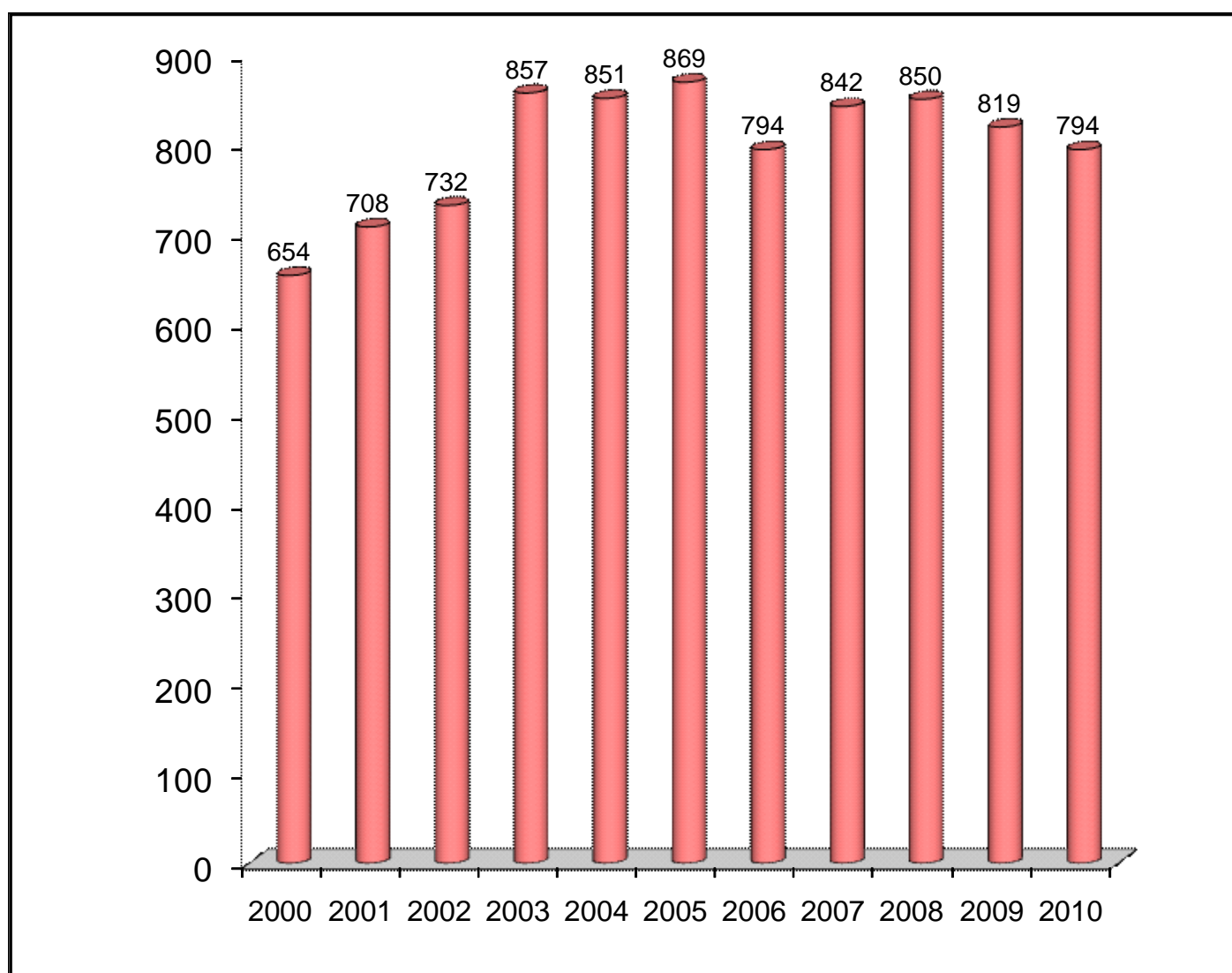
## FRANCE - BICYCLE SALES (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	3,338	2,952	2,986	3,528	3,518	3,764	3,465	3,466	3,336	3,132	3,031
Evolution year/year-1 (%)		-11.56	1.15	18.15	-0.28	6.99	-7.94	0.03	-3.75	-6.12	-3.22

**Comments : SALES = SALES TO CONSUMERS**

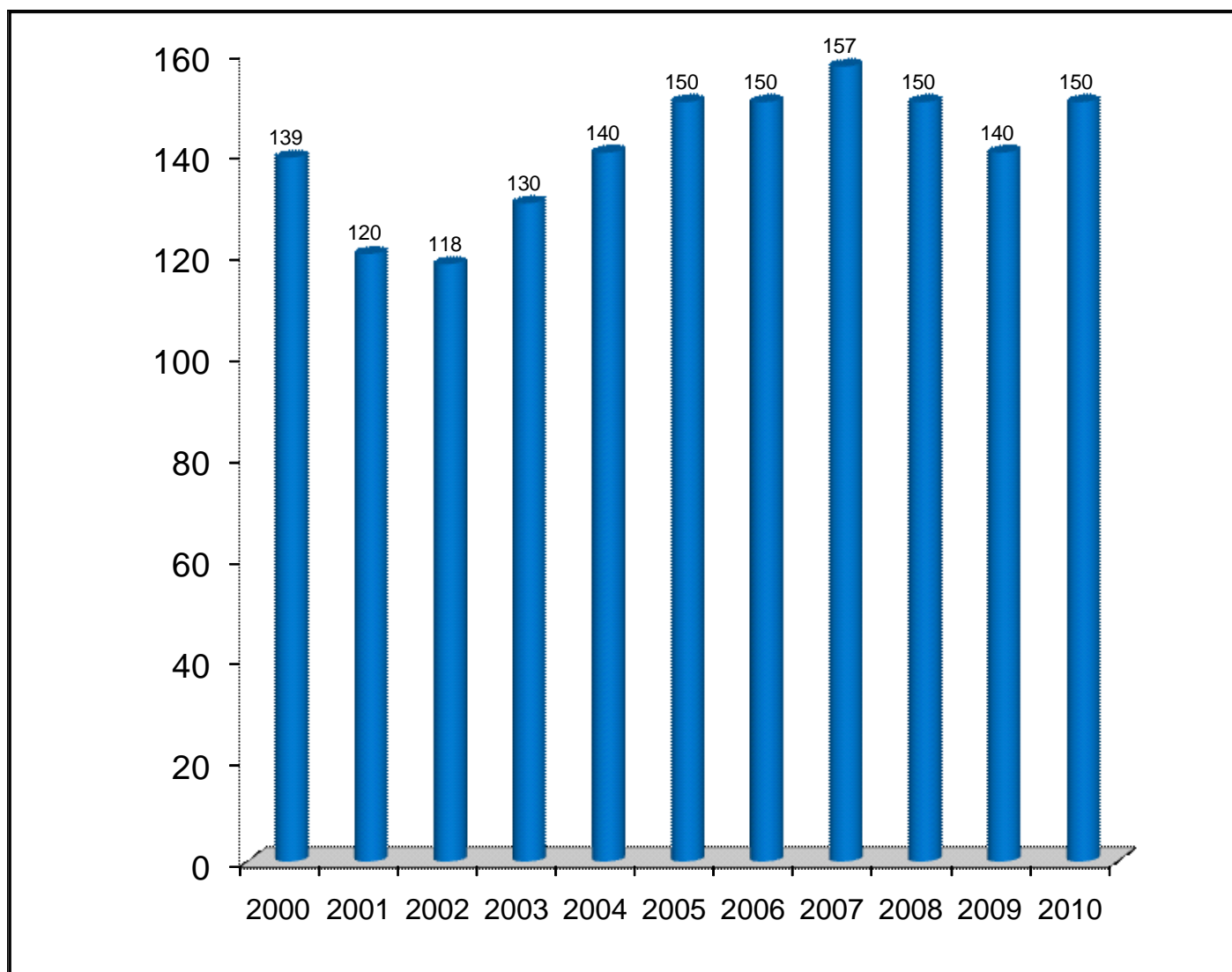
## FRANCE - BICYCLE SALES (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (M€)	654	708	732	857	851	869	794	842	850	819	794
Evolution year/year-1 (%)		8.26	3.39	17.08	-0.70	2.12	-8.63	6.05	0.95	-3.65	-3.05

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

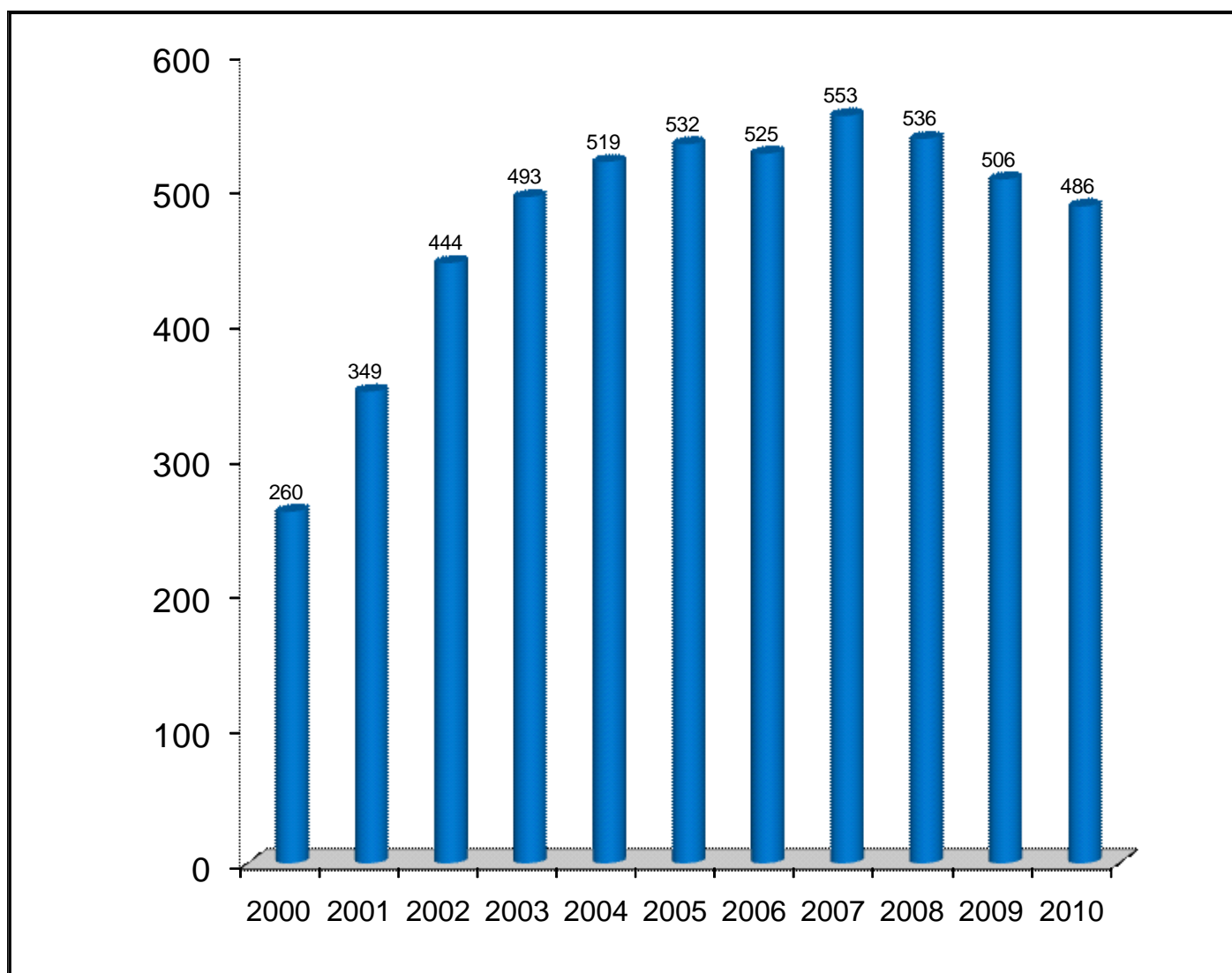
## FRANCE - PARTS & ACCESSORIES PRODUCTION (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Production (M€)	139	120	118	130	140	150	150	157	150	140	150
Evolution year/year-1 (%)		-13.67	-1.67	10.17	7.69	7.14	0.00	4.67	-4.46	-6.67	7.14

**Comments : VALUES EXCLUDING VAT**

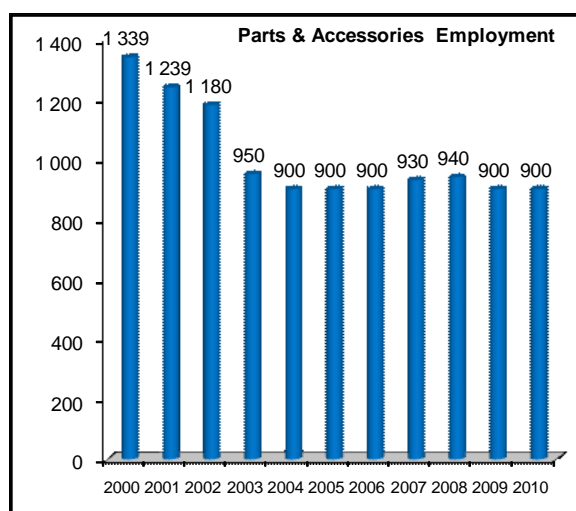
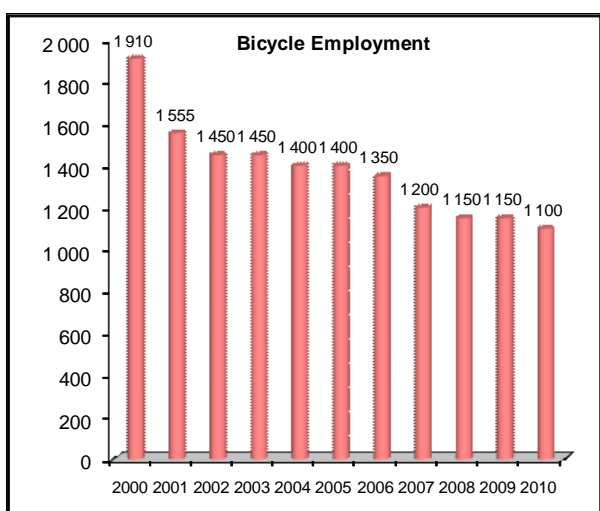
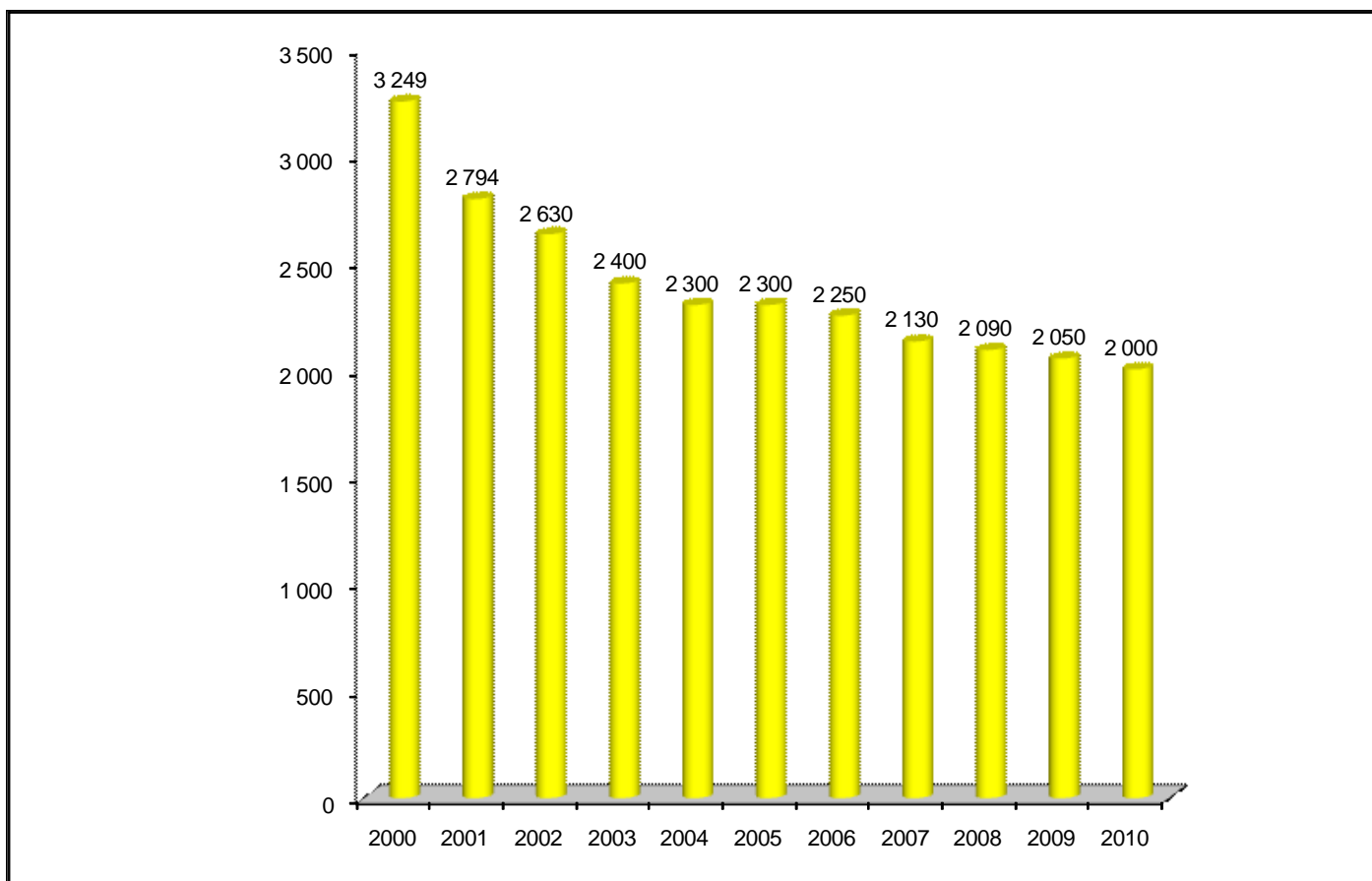
## FRANCE - PARTS AND ACCESSORIES SALES (M€) 2000 – 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Sales (M€)	260	349	444	493	519	532	525	553	536	506	486
Evolution year/year-1 (%)		34.23	27.22	11.04	5.27	2.50	-1.32	5.33	-3.07	-5.60	-3.95

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

## FRANCE - BICYCLE EMPLOYMENT 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Employment	1,910	1,555	1,450	1,450	1,400	1,400	1,350	1,200	1,150	1,150	1,100
P & A Employment	1,339	1,239	1,180	950	900	900	900	930	940	900	900
<b>Total</b>	<b>3,249</b>	<b>2,794</b>	<b>2,630</b>	<b>2,400</b>	<b>2,300</b>	<b>2,300</b>	<b>2,250</b>	<b>2,130</b>	<b>2,090</b>	<b>2,050</b>	<b>2,000</b>

# Germany



## GERMAN BICYCLE INDUSTRY LOOKS OPTIMISTIC IN THE FUTURE

In 2010, the German bicycle and bicycle components' industry produced 2.22 million bicycles and a large number of bicycle components and accessories.

The production of bicycles in 2010 was nearly at the same level as in 2009 which shows that the "quality made in Germany" is highly asked for.

Compared with the previous year, the average production value increased by 7% to 306.00 € per piece.

Responsible for this positive development is the higher amount of EPACs as well as the higher quality awareness at the consumers' side.

In 2010, the German industry produced bicycles and EPACs with a total value of 680 million €.

48.4% of all imports into Germany originated in the other Member States of the European Union. These EU countries slightly strengthened their position in 2010.

Imports from Asia represented about 49% and was, therefore, at the same level as last year.

The total import value in 2010 amounted to 557 million €, or 6% more than in 2009 (528 million €).

In the same period, the number of imported bicycles decreased by 0.62% to 2.71 million pieces.

Responsible for the increase in the import value is, of course, the higher price of EPACs. These electric power-assisted cycles are also responsible for the increase of the average value of the imported bicycles to Germany of 6.2% to 206 €/piece (year 2009: 194 €/piece).

"Quality made in Germany" is particularly asked for in EU and EFTA countries, where 94 percent of the exports went to.

Although exports are stable since 3 years at about 1 million units per year, the average export value per bicycle increased by 27.5% to 352.00 €/piece in the year 2010.

Bicycle sales were stable with around 4.01 million bicycles in the year 2010.

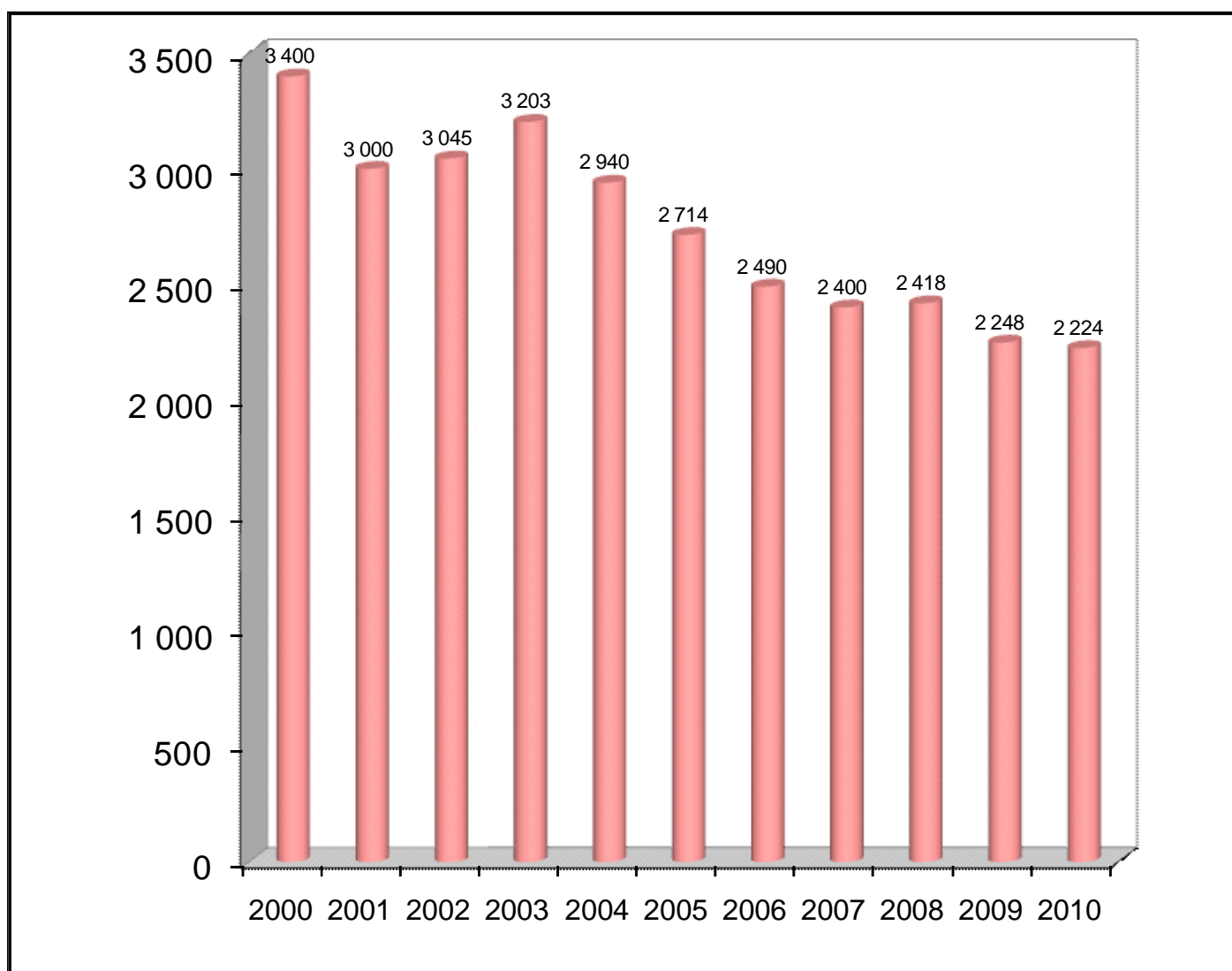
The average sales price in the year 2010 was about 460.00 €/piece.

The share of bicycles sold by the IBDs (independent bicycle dealers) increased to 69% compared to 68% in the year 2009. This clearly shows that the IBDs were successful in a difficult economic environment.

In Germany the EPAC market grew from 150,000 in 2009 to about 200,000 units sold in the year 2010.

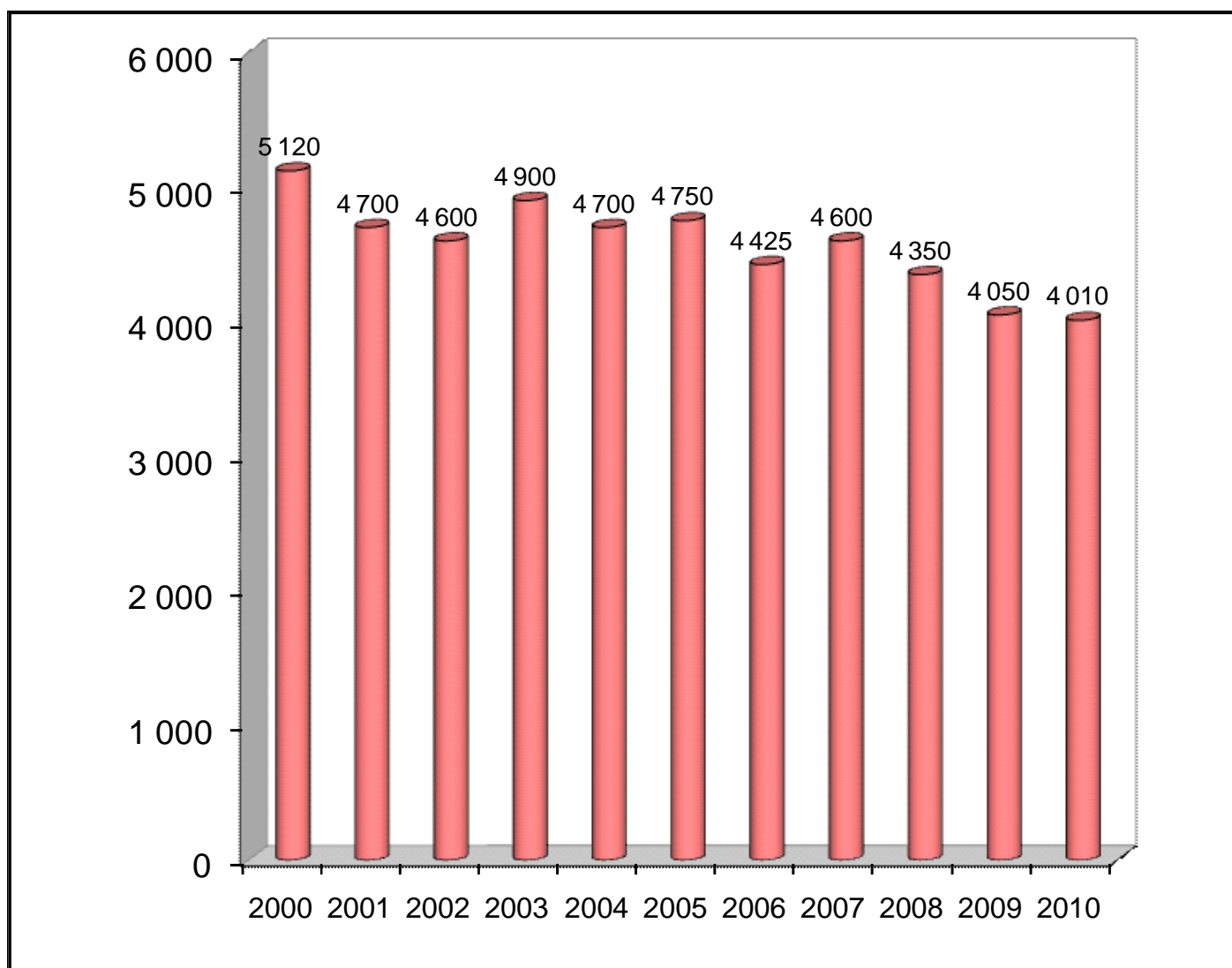
The German Two-Wheeler Industry Association (ZIV) represents the interests of the German bicycle-, bicycle parts-, accessories- and EPAC-industry. The ZIV has around 80 member companies and is located nearby Frankfurt / Main.

## GERMANY - BICYCLE PRODUCTION (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	3,400	3,000	3,045	3,203	2,940	2,714	2,490	2,400	2,418	2,248	2,224
Evolution year/year-1 (%)		-11.76	1.50	5.19	-8.21	-7.69	-8.25	-3.61	0.75	-7.03	-1.07

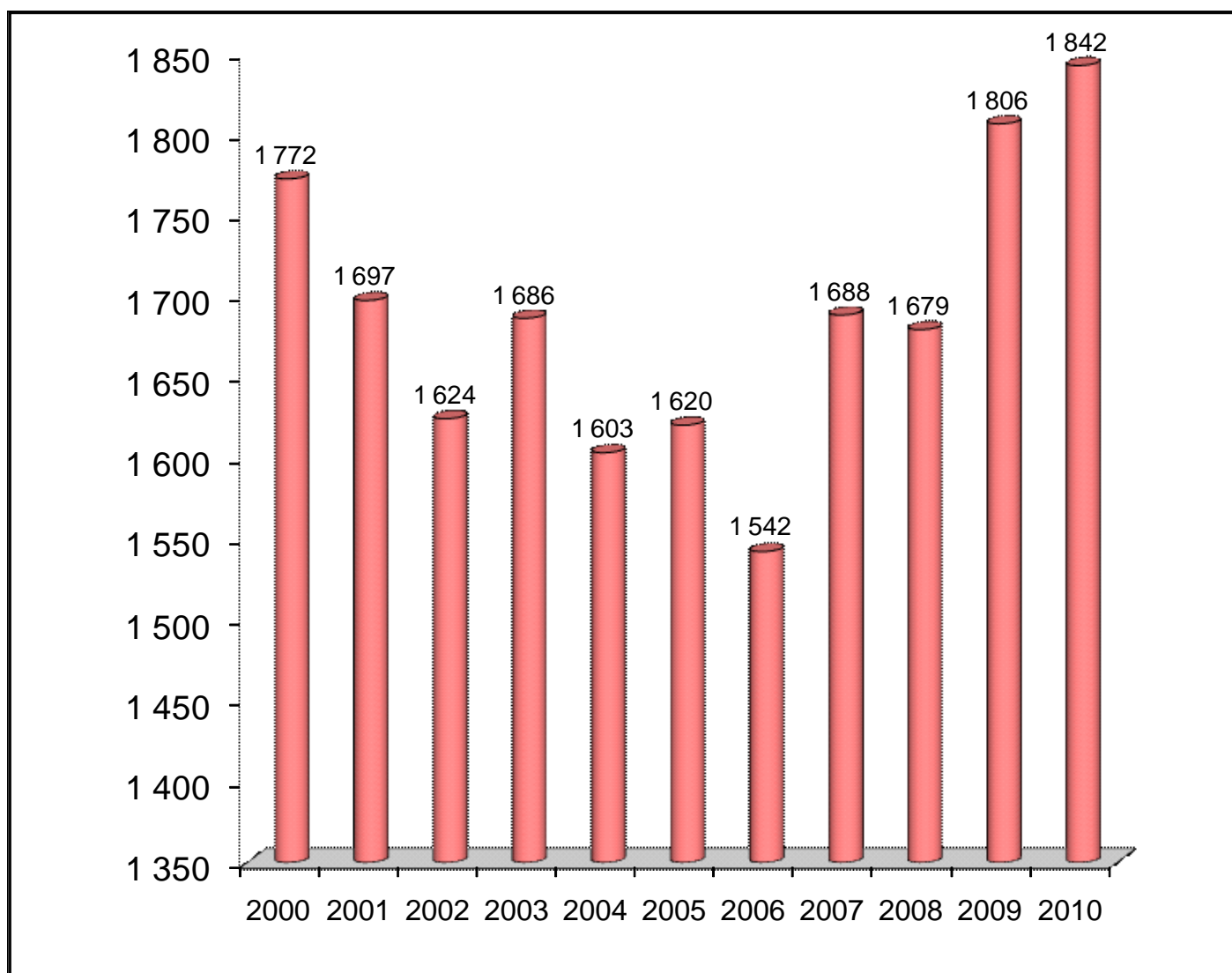
## GERMANY - BICYCLE SALES (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	5,120	4,700	4,600	4,900	4,700	4,750	4,425	4,600	4,350	4,050	4,010
Evolution year/year-1 (%)		-8.20	-2.13	6.52	-4.08	1.06	-6.84	3.95	-5.43	-6.90	-0.99

**Comments : SALES = SALES TO CONSUMERS**

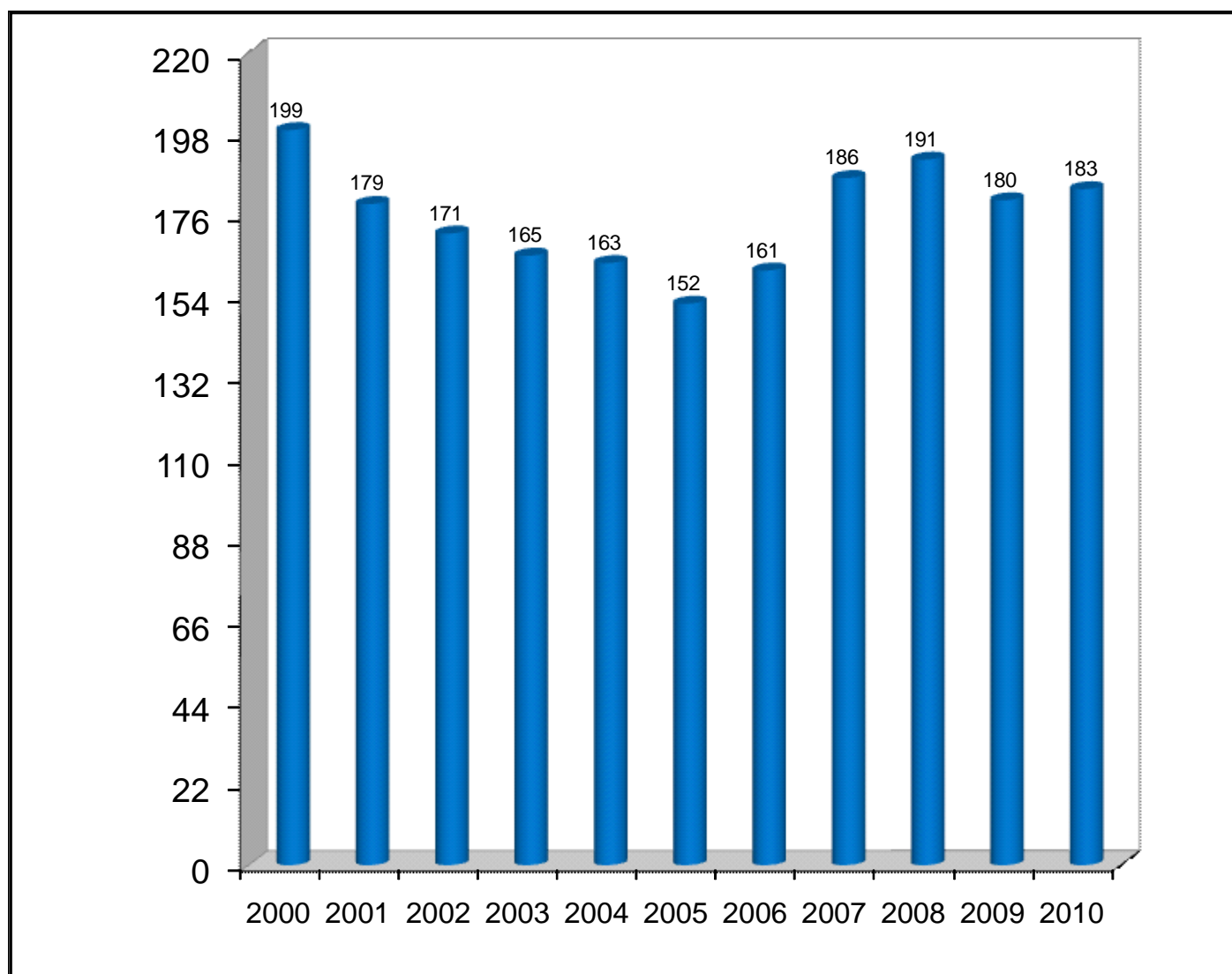
## GERMANY - BICYCLE SALES (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (M€)	1,772	1,697	1,624	1,686	1,603	1,620	1,542	1,688	1,679	1,806	1,842
Evolution year/year-1 (%)		-4.23	-4.30	3.82	-4.92	1.06	-4.81	9.47	-0.53	7.56	1.99

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

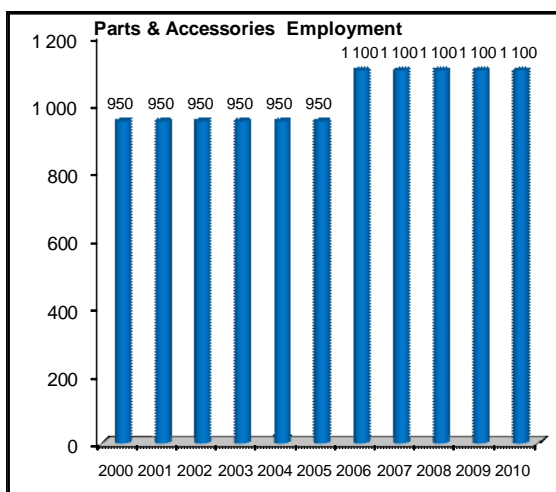
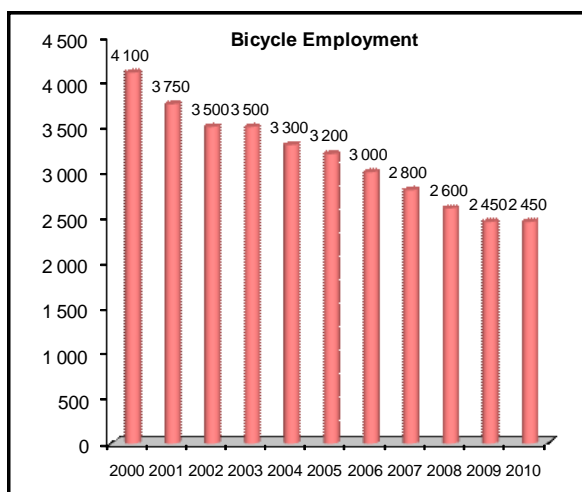
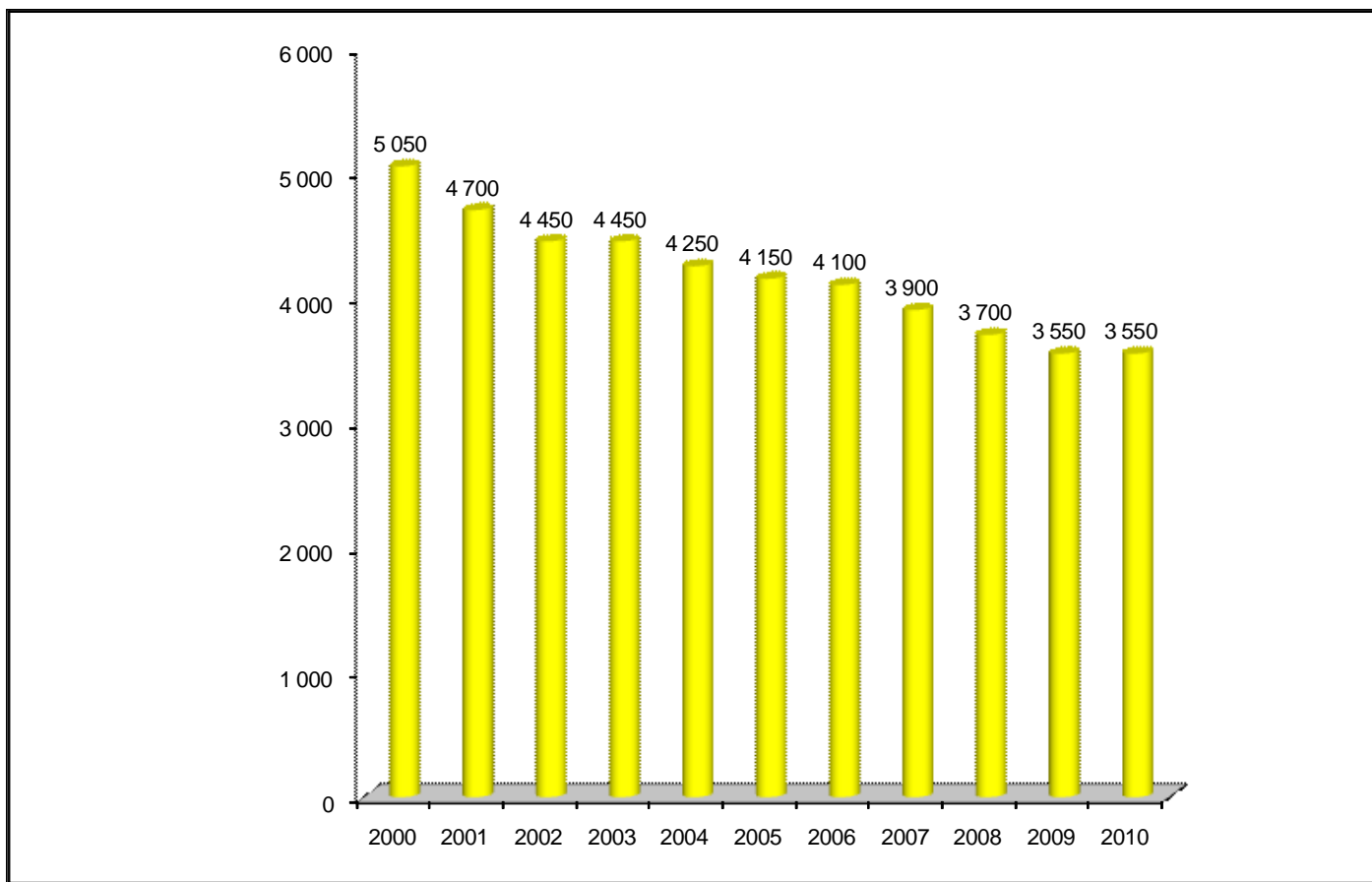
## GERMANY - PARTS & ACCESSORIES PRODUCTION (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Production (M€)	199	179	171	165	163	152	161	186	191	180	183
Evolution year/year-1 (%)		-10.05	-4.47	-3.51	-1.21	-6.75	5.92	15.53	2.69	-5.76	1.67

**Comments : VALUES EXCLUDING VAT**

## GERMANY - BICYCLE EMPLOYMENT 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Employment	4,100	3,750	3,500	3,500	3,300	3,200	3,000	2,800	2,600	2,450	2,450
P & A Employment	950	950	950	950	950	950	1,100	1,100	1,100	1,100	1,100
<b>Total</b>	<b>5,050</b>	<b>4,700</b>	<b>4,450</b>	<b>4,450</b>	<b>4,250</b>	<b>4,150</b>	<b>4,100</b>	<b>3,900</b>	<b>3,700</b>	<b>3,550</b>	<b>3,550</b>

# Great Britain



## UK – Statistics 2010: Commentary

Bicycle imports to UK increased 24% in units, compared with 2009. This growth is not reflected in unofficial estimates of sales to the consumer in 2010. Bad weather in Q4, and uncertainty about the Government's changes in regulations for commuter cycling purchase schemes created a sharp fall in demand, with a consequent rise in stocks.

Specialist retailers (about 40% of the total market) estimated a 3% growth in units sold in 2010. However, Halfords and mass merchants appear to have seen up to 15% increase in (predominantly cheap) bike sales.

A rough estimate of consumer sales for 2010 is, therefore, about 3.6 million units.

Expectations for 2011 are disappointing. Imports to the end of May were 10% below 2010, with May alone being 30% below May 2010. High stocks and poor weather in Q1 were the principal cause.

Little information is available about internet sales direct to consumers, though this sector appears to be growing strongly.

Electric power-assisted cycles (EPACs) have not yet made an impact on the UK market, with unit sales at about 20-25,000 in 2010.

Factors influencing this low growth include:

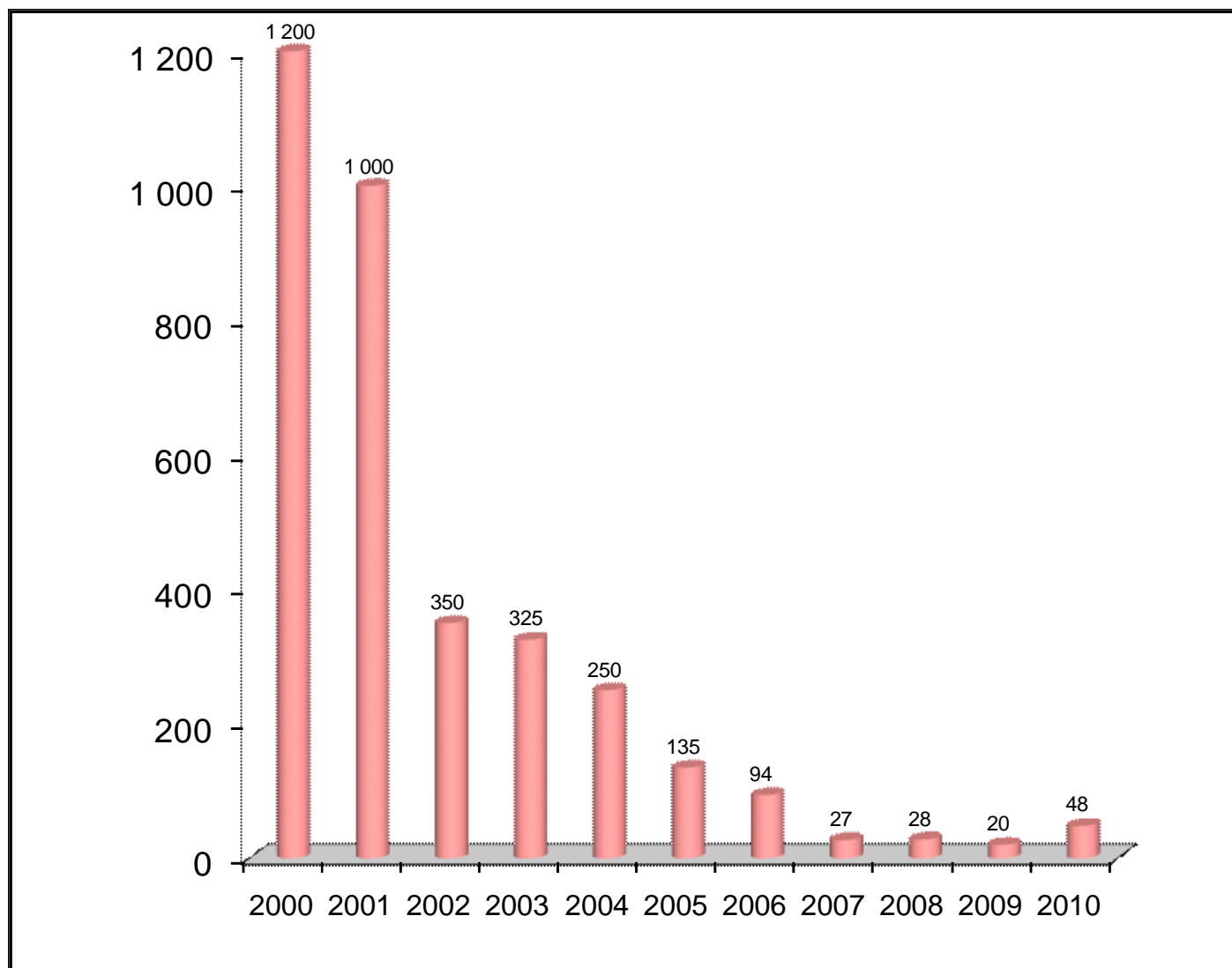
- Relatively high price (1500+) vs. pedal cycles.
- History of poor quality/performance/reliability in the past.
- Target audience (over 50 years of age) unlikely to visit cycle shops.
- Trade uncertainty about regulations regarding EPACs vs. scooters/mopeds.

The import value of bicycles in 2010 has risen sharply (+39%) vs. 2010. This is attributed to the general increases in production costs in Asia, as well as the weaker value of sterling.

The role of the bicycle in the UK remains principally for leisure purposes. It is estimated that about one third of the sales are for children's bikes. Mountain bikes are by far the most popular type of bike, even when used on road.

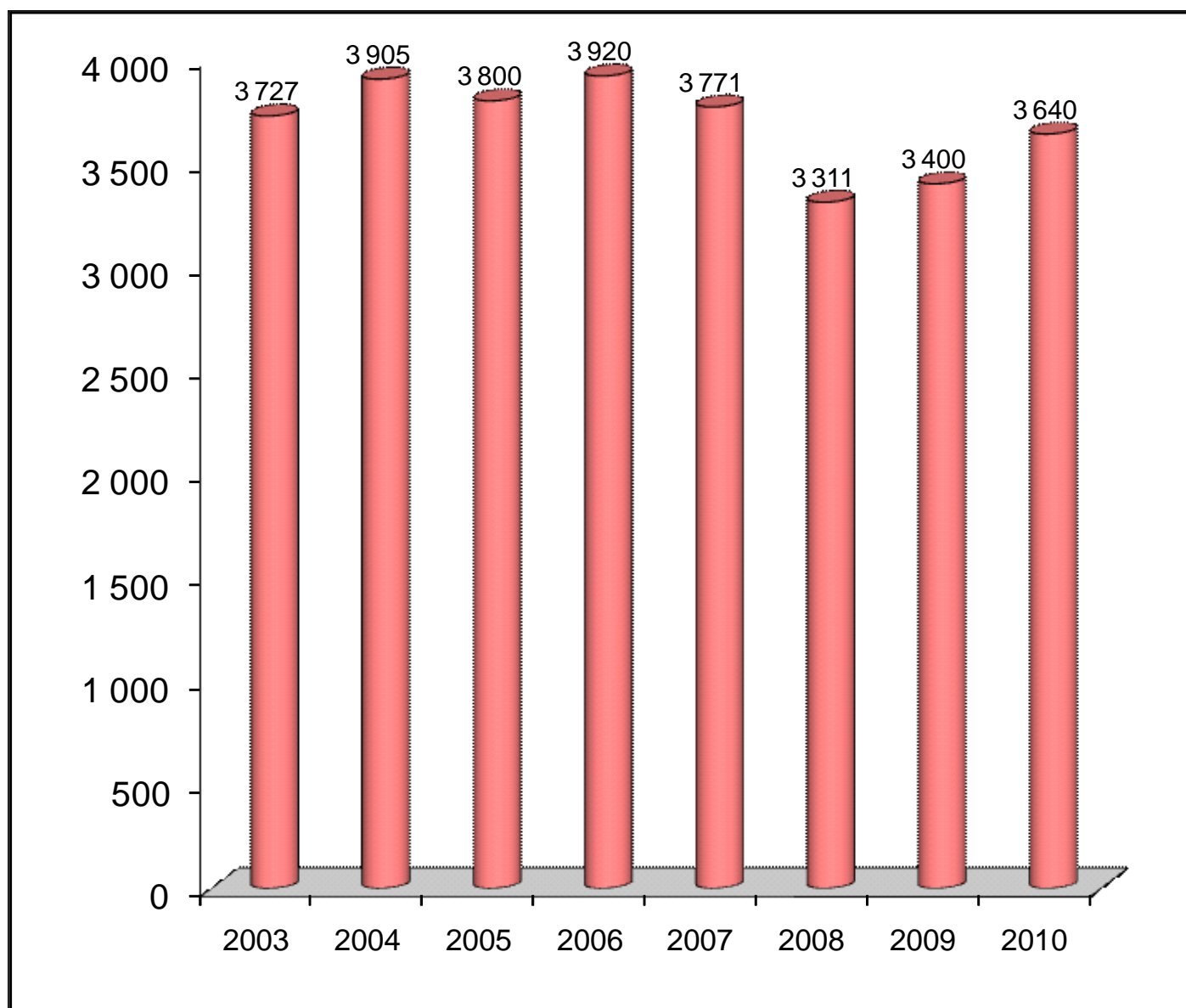
Increasing commuter cycling was encouraged by the previous Government, though is not now a priority of the present coalition. London continues to lead the nation, with about 500,000 trips a day by bike, and usage of the Cycle Hire Scheme is about 30,000 trips a day.

## GREAT BRITAIN - BICYCLE PRODUCTION (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	1,200	1,000	350	325	250	135	94	27	28	20	48
Evolution year/year-1 (%)		-16.67	-65.00	-7.14	-23.08	-46.00	-30.37	-71.28	3.70	-28.57	140.00

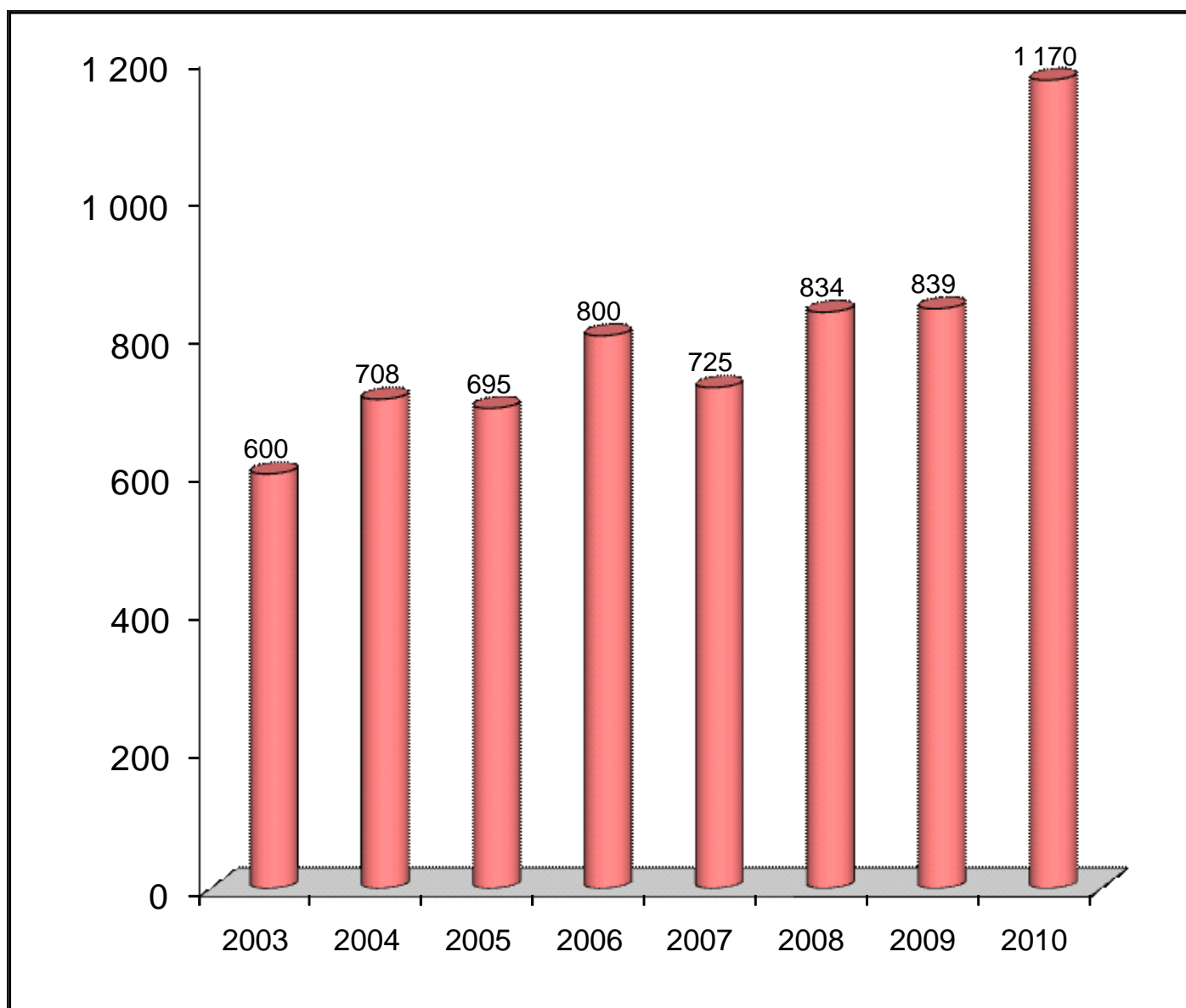
## GREAT BRITAIN - BICYCLE SALES (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	2,300	2,400	2,300	3,727	3,905	3,800	3,920	3,771	3,311	3,400	3,640
Evolution year/year-1 (%)		4.35	-4.17	62.04	4.78	-2.69	3.16	-3.80	-12.20	2.69	7.06

**Comments : SALES = SALES TO CONSUMERS**

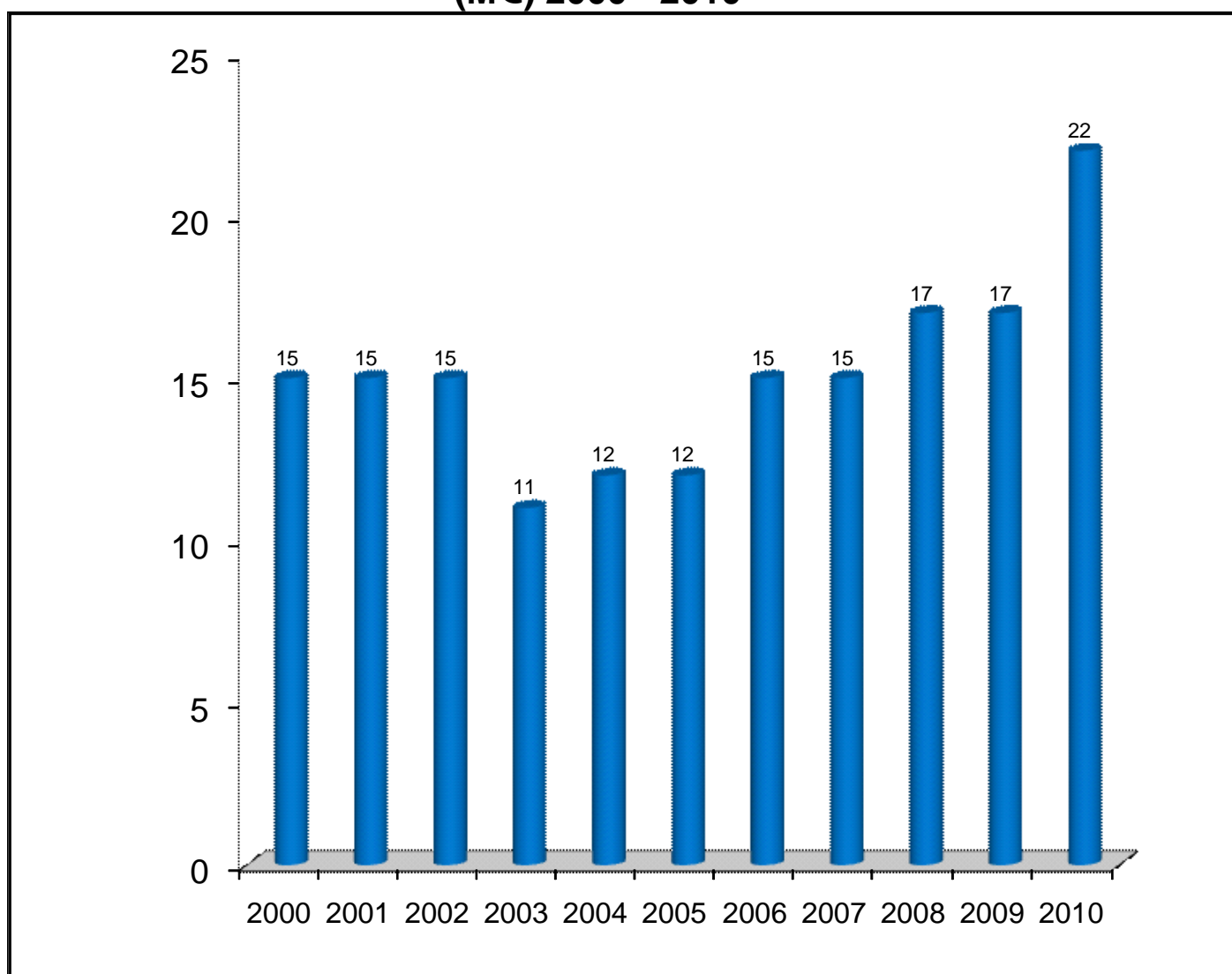
## GREAT BRITAIN - BICYCLE SALES (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (M€)	430	380	320	600	708	695	800	725	834	839	1,170
Evolution year/year-1 (%)		-11.63	-15.79	87.50	18.00	-1.84	15.11	-9.38	15.03	0.60	39.45

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

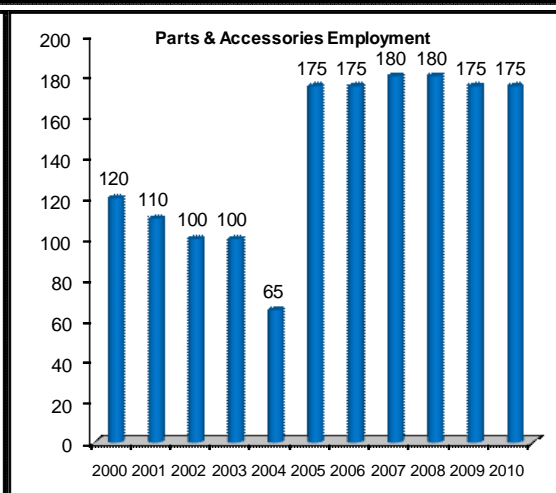
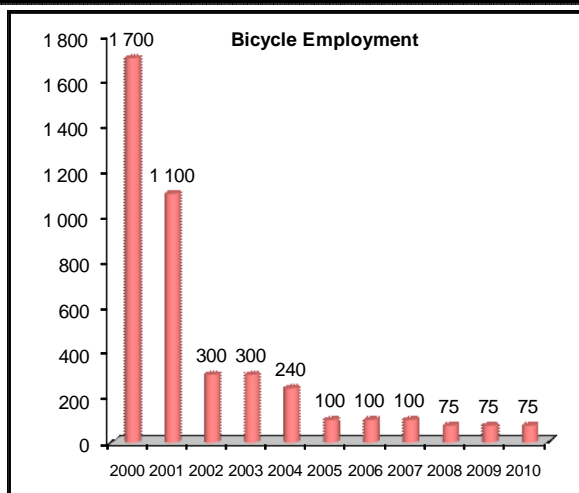
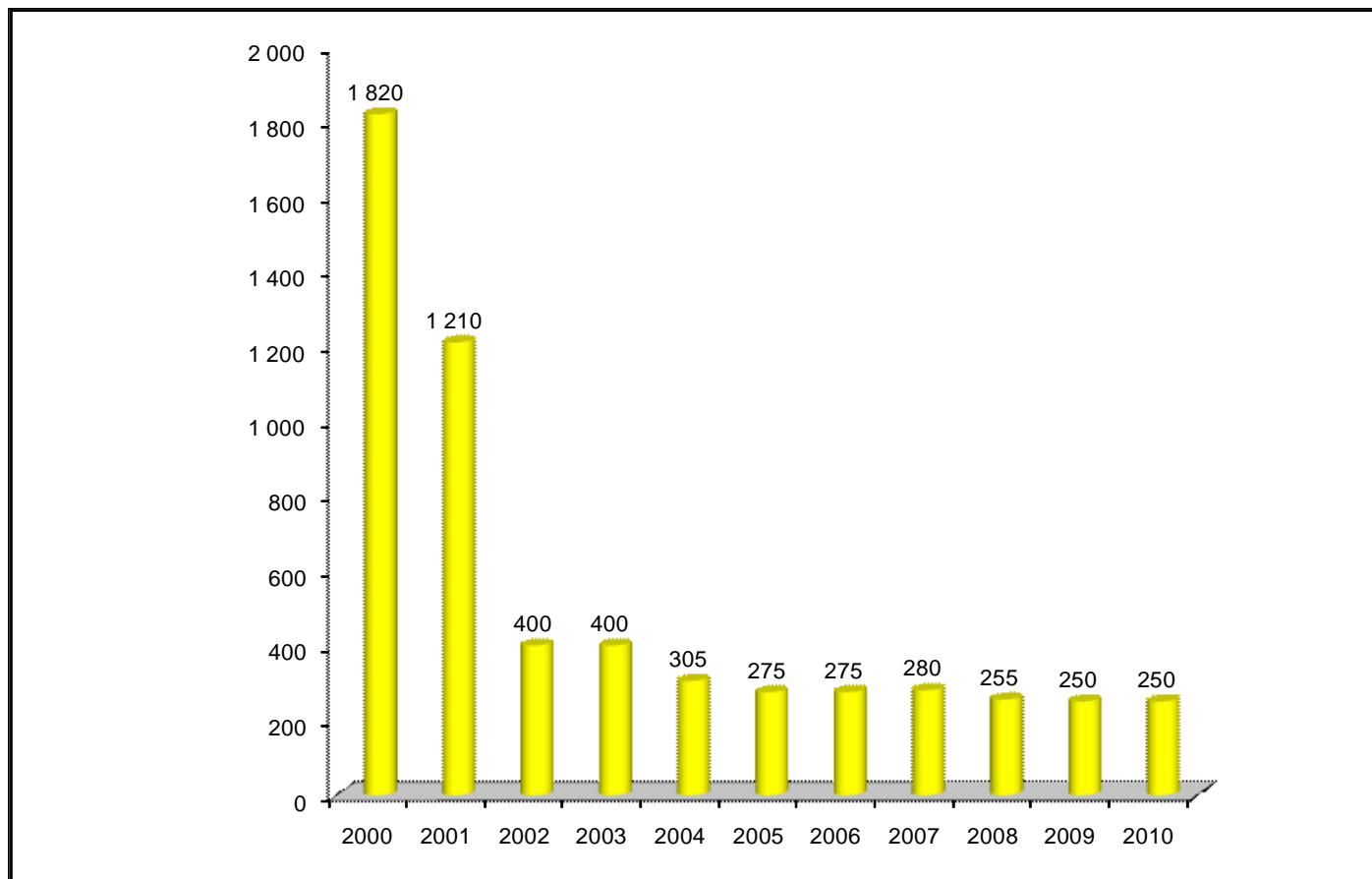
## GREAT BRITAIN - PARTS & ACCESSORIES PRODUCTION (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Production (M€)	15	15	15	11	12	12	15	15	17	17	22
Evolution year/year-1 (%)		0.00	0.00	-26.67	9.09	0.00	25.00	0.00	13.33	0.00	29.41

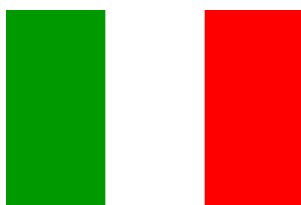
**Comments : VALUES EXCLUDING VAT**

## GREAT BRITAIN - BICYCLE EMPLOYMENT 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Employment	1,700	1,100	300	300	240	100	100	100	75	75	75
P & A Employment	120	110	100	100	65	175	175	180	180	175	175
<b>Total</b>	<b>1,820</b>	<b>1,210</b>	<b>400</b>	<b>400</b>	<b>305</b>	<b>275</b>	<b>275</b>	<b>280</b>	<b>255</b>	<b>250</b>	<b>250</b>

# Italy



## The Italian bicycle market – some comments

In 2010, the Italian bicycle market reached a normal level of sales, even though 2009 closed with a very significant increase in sales (+ 8%). This in absolute contrast with all the other European countries, where there was an average drop of - 5% in the same period. The Italian boom in bicycle sales was mainly due to the Incentives' campaign of the Ministry of the Environment.

In 2010, bicycle sales amounted to 1,771,000 units or 7% less compared with 2009. The result was a fall in production to 2,489,000 units. This was a decrease of almost 4% compared to 2009.

Italy is still the country that produces and exports the largest number of bicycles in Europe.

1,354,000 bicycles were exported (an increase of 5.4%), while imports remained basically stable with 636,000 bikes, almost all imported from Asia.

The parts (frames, groups, saddles and many other high-end components) have seen an increase in exports, scoring nearly 400 million in revenue, an increase of 13% compared to 2009.

The first quarter of 2011 was one of the worst in recent years, especially due to the bad weather. As from April, instead of seeing a recovery in the market, the signals were not marked by optimism. Only by the end of September, market trends can be assessed.

In many European countries, bicycles are used for commuting purposes throughout the year. In Italy, however, bicycles are seasonal products: in summer, Italians go biking.

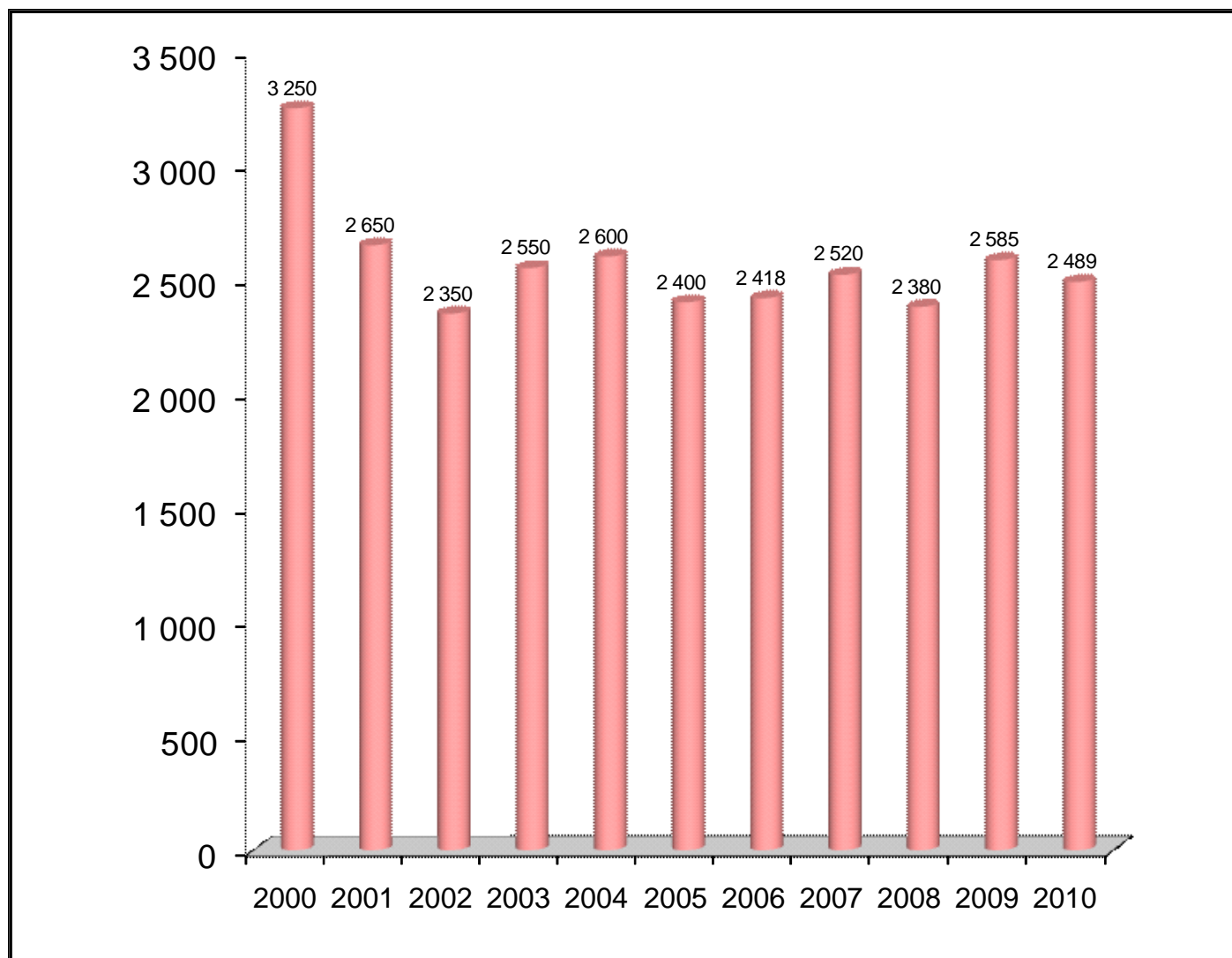
There are more and more bicycle lanes and tracks and greater attention is given to this vehicle, especially in large urban centers. New lifestyles and new individual travel behavior have to be promoted, while remembering that the bicycle is the perfect vehicle to use for journeys of less than 5 km. Moreover, cycling (more) is good for one's health and for the environment.

Bicycles are mainly sold in hypermarkets, but as a result of higher demand for quality, also the share of the Specialist distribution channels is growing.

In Italy, the bicycle's main purpose is **SPORTS**, followed by **LEISURE** and only on the third place by **COMMUTING** (urban mobility).

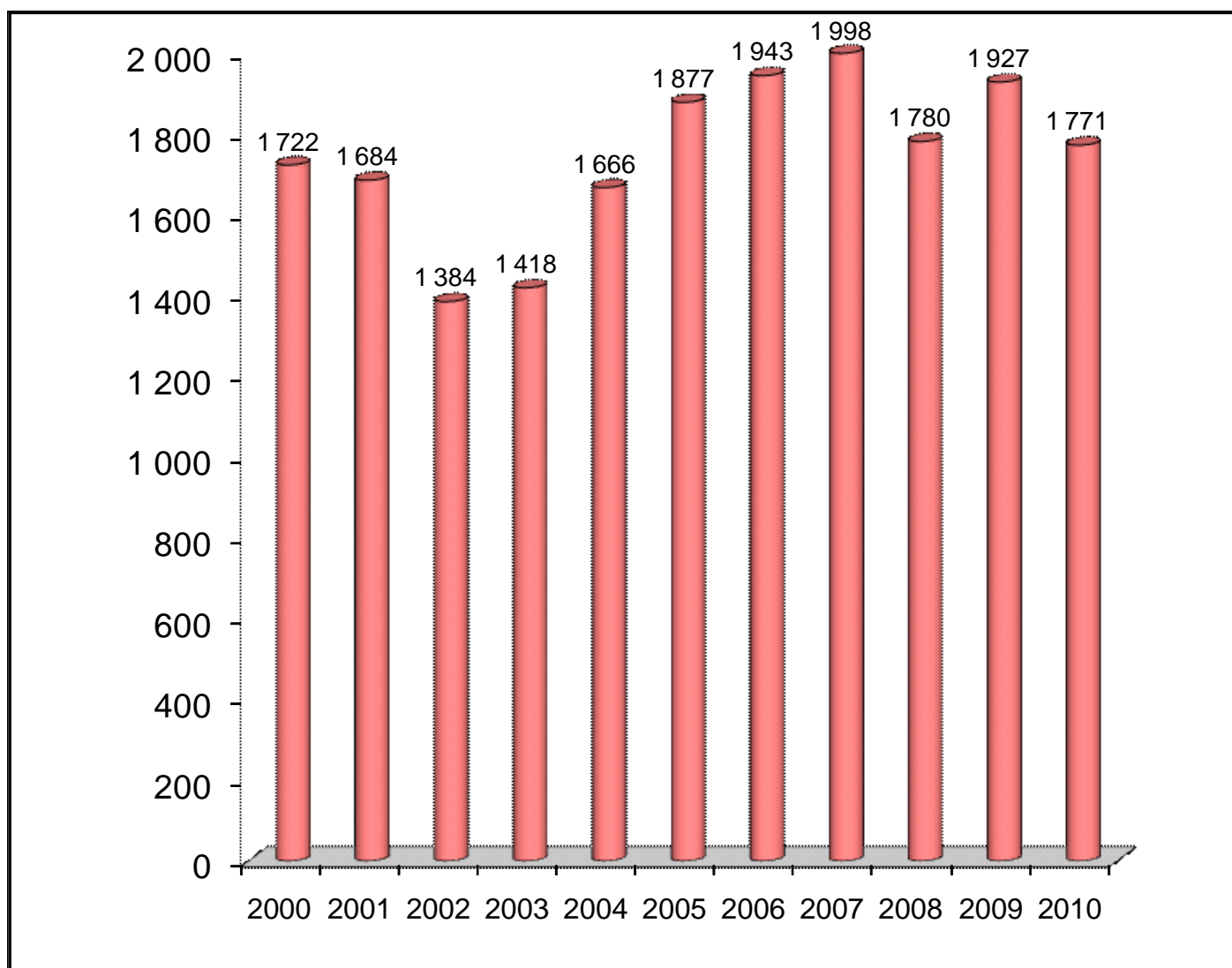
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## ITALY BICYCLE - PRODUCTION (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	3,250	2,650	2,350	2,550	2,600	2,400	2,418	2,520	2,380	2,585	2,489
Evolution year/year-1 (%)		-18.46	-11.32	8.51	1.96	-7.69	0.75	4.22	-5.56	8.61	-3.71

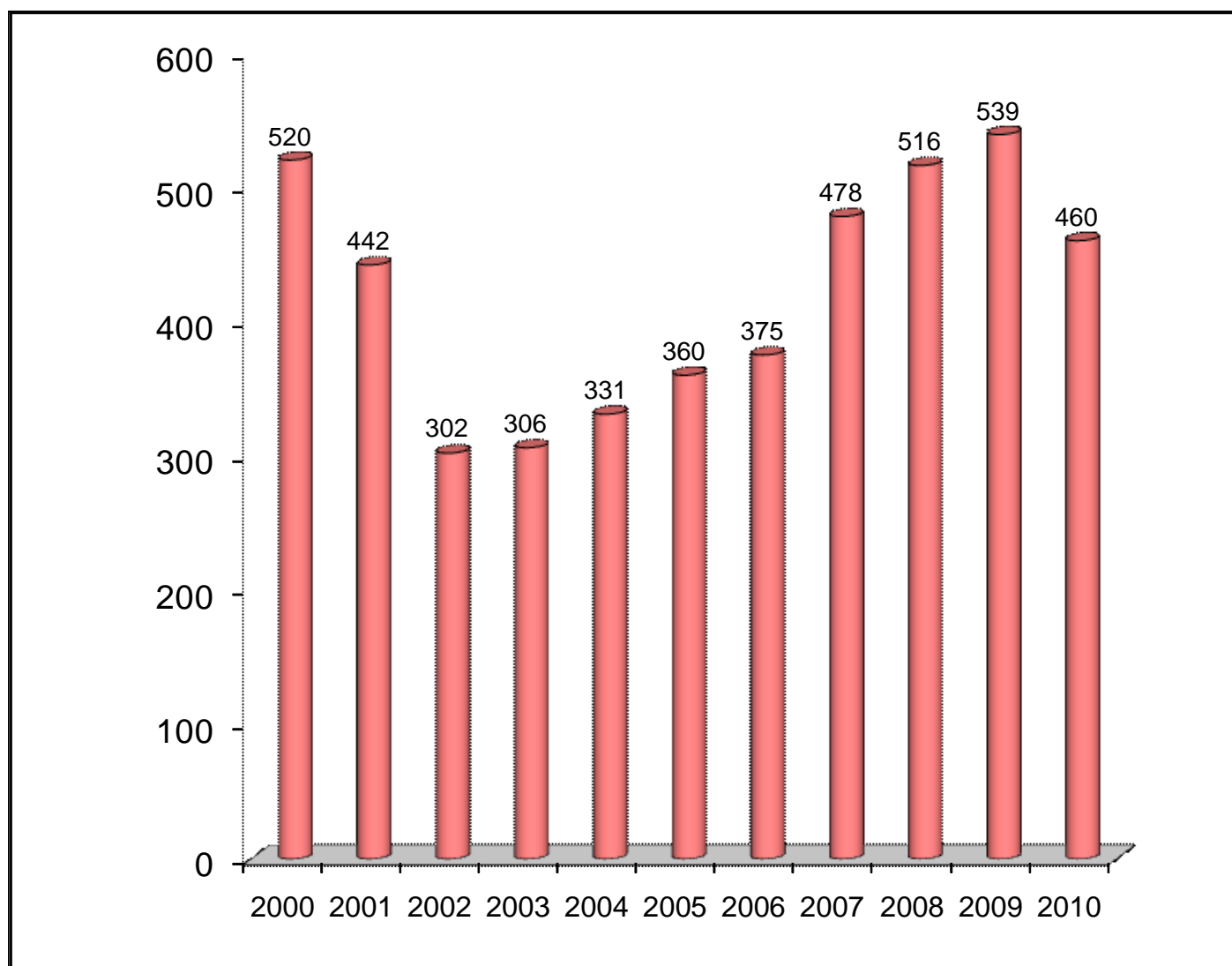
## ITALY - BICYCLE SALES (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	1,722	1,684	1,384	1,418	1,666	1,877	1,943	1,998	1,780	1,927	1,771
Evolution year/year-1 (%)		-2.21	-17.81	2.46	17.49	12.67	3.52	2.83	-10.91	8.26	-8.10

**Comments : SALES = SALES TO CONSUMERS**

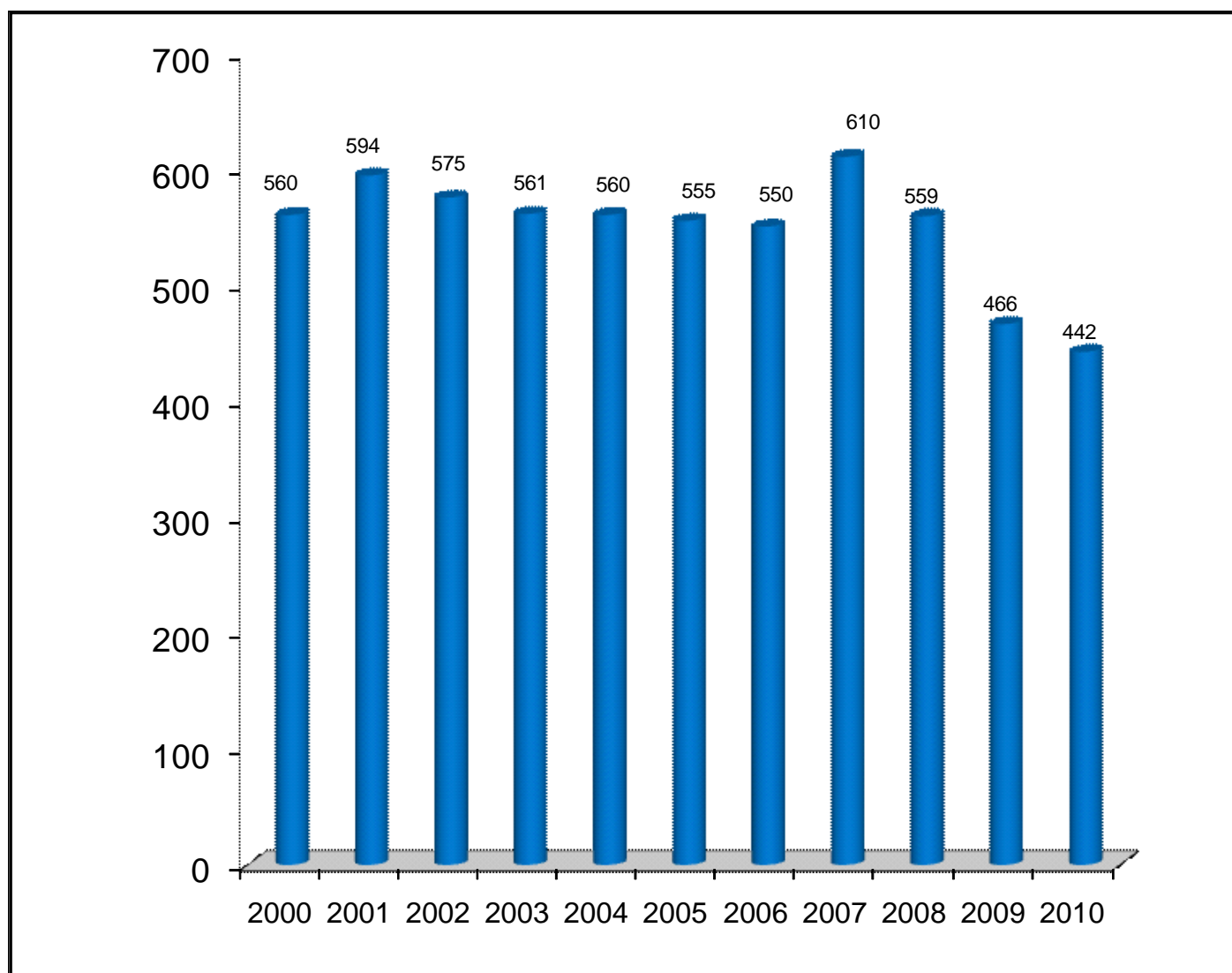
## ITALY - BICYCLE SALES (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (M€)	520	442	302	306	331	360	375	478	516	539	460
Evolution year/year-1 (%)		-15.00	-31.67	1.32	8.17	8.76	4.17	27.47	7.95	4.46	-14.66

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

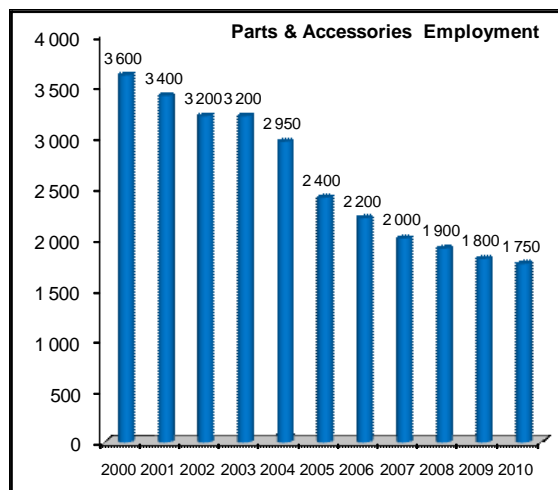
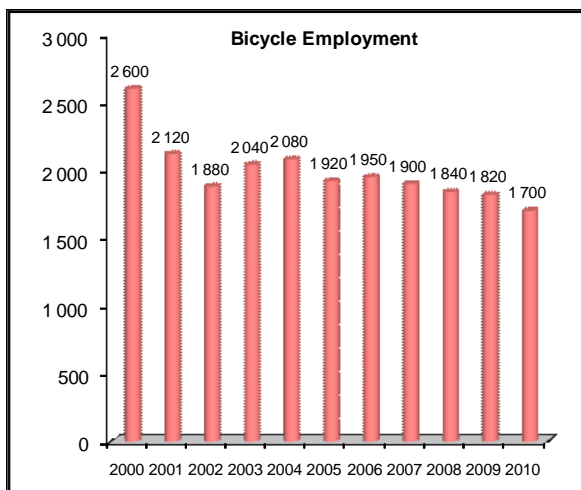
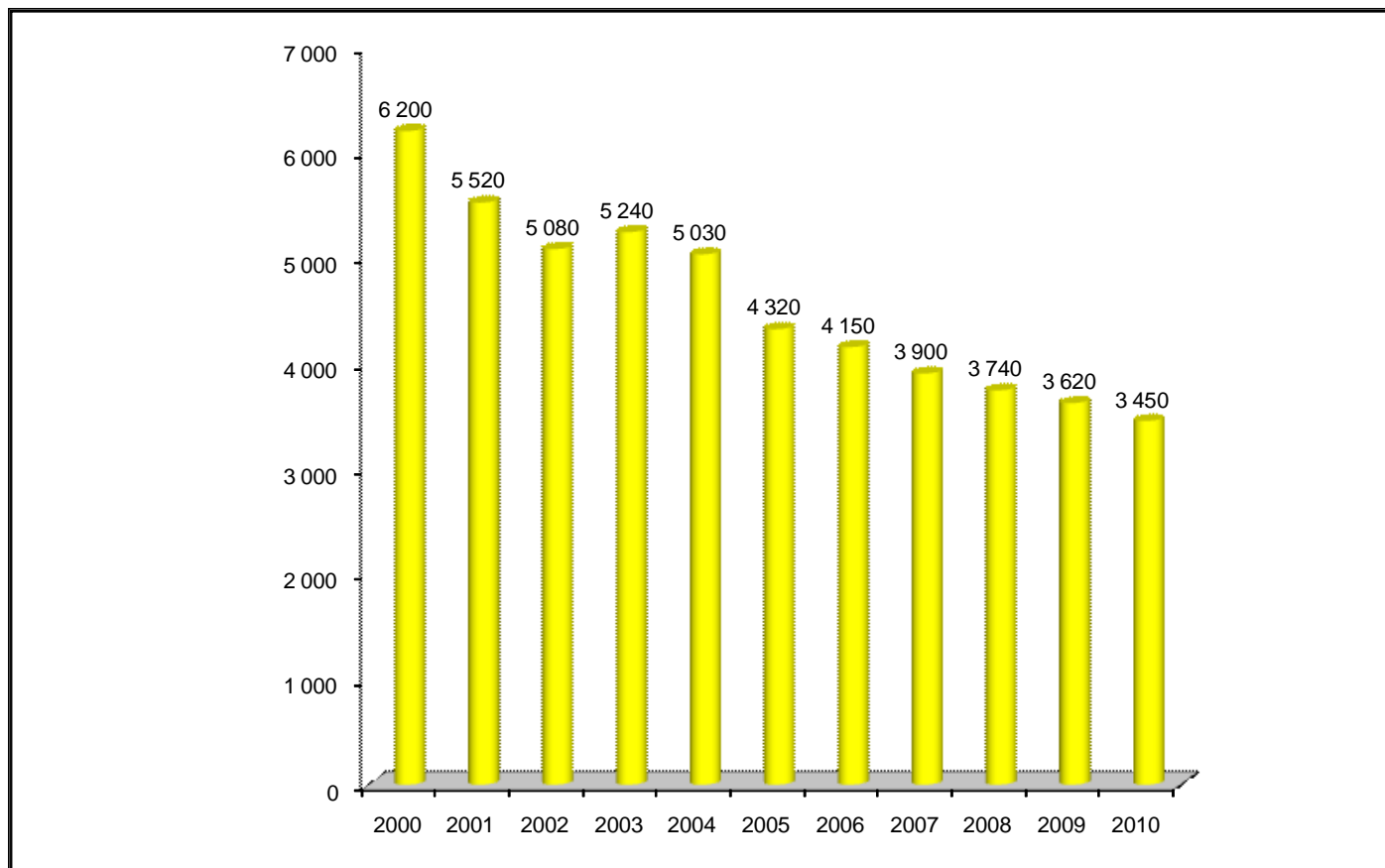
## ITALY - PARTS & ACCESSORIES PRODUCTION (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Production (M€)	560	594	575	561	560	555	550	610	559	466	442
Evolution year/year-1 (%)		6.07	-3.20	-2.43	-0.18	-0.89	-0.90	10.91	-8.36	-16.64	-5.15

**Comments : VALUES EXCLUDING VAT**

## ITALY - BICYCLE EMPLOYMENT 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Employment	2,600	2,120	1,880	2,040	2,080	1,920	1,950	1,900	1,840	1,820	1,700
P & A Employment	3,600	3,400	3,200	3,200	2,950	2,400	2,200	2,000	1,900	1,800	1,750
Total	6,200	5,520	5,080	5,240	5,030	4,320	4,150	3,900	3,740	3,620	3,450

# The Netherlands



## The Netherlands – Bicycle market 2010: Commentary

Bicycle sales in 2010 decreased by 5.3%, reaching a total of 1,213,000 bicycles (2009: 1,281,000 units). The turnover decreased by 2.8% to € 903,934,000.

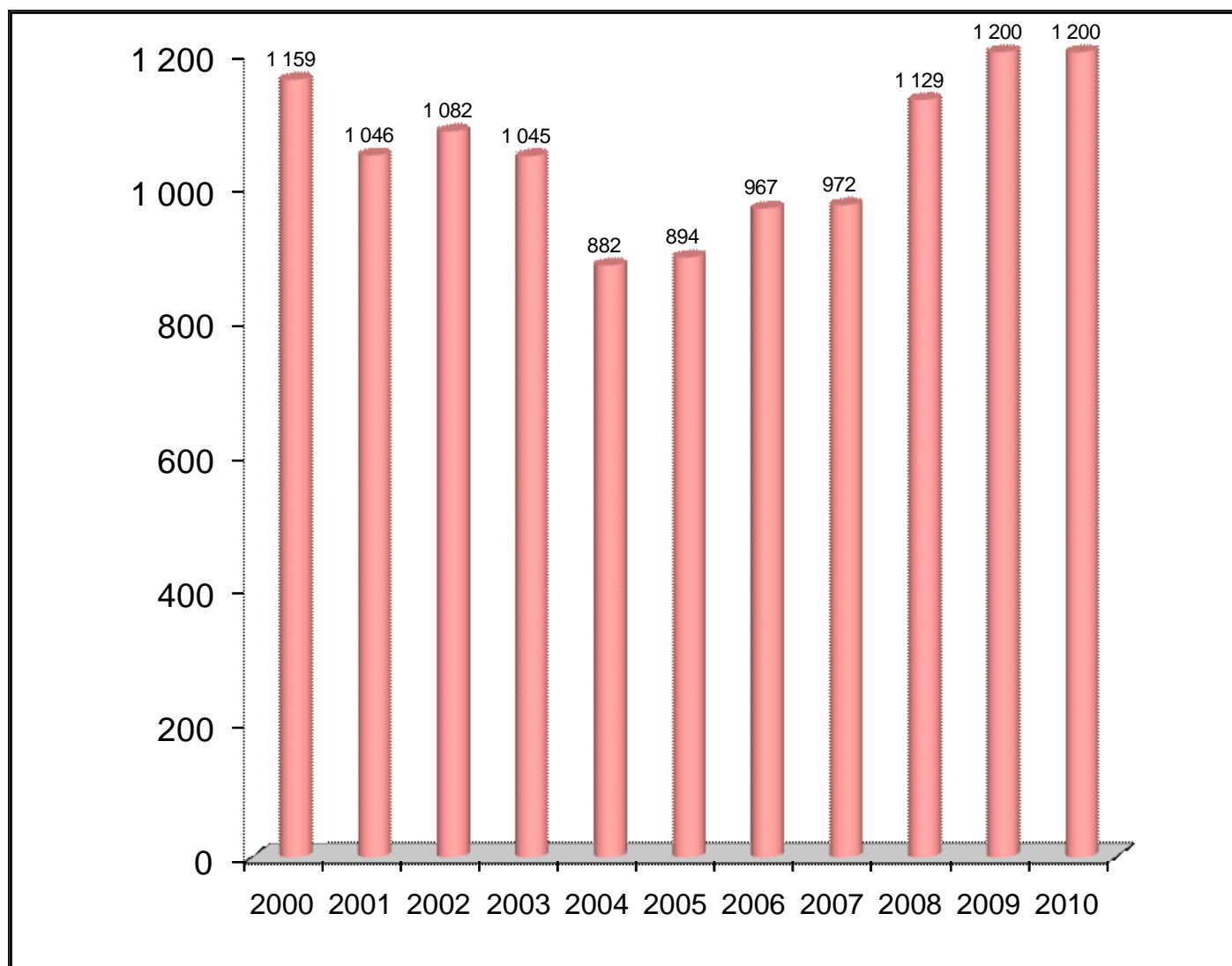
The economic crisis had a negative impact on the sale of all types of bicycles, as consumers postponed new purchases. Also the bad weather conditions had a negative effect on sales, except for the Electric Power-Assisted Cycles (EPACs). This type of bicycle knows an ever increasing popularity.

The average price of an **EPAC** in 2010 amounted to € 1,928.00. Most EPACs are sold by the Independent Bicycle Dealers (IBDs), who play an important role in advising the consumer and providing service and maintenance. In 2010, 171,000 EPACs were sold; an increase of 11.8% compared to 2009.

### BICYCLE MARKET IN THE NETHERLANDS 2010

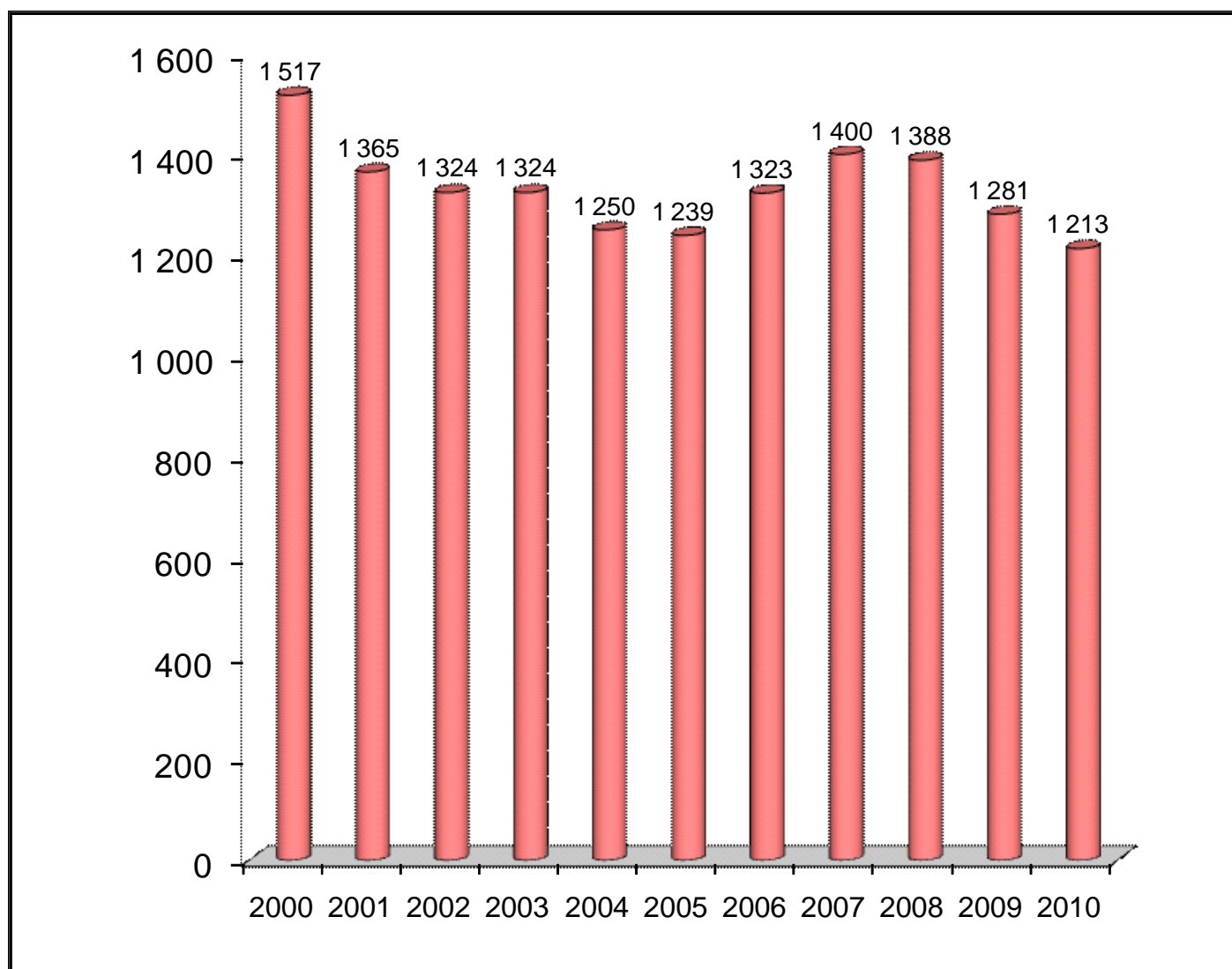
Sales of new bicycles by category (x 1,000 units)	2009	2010	%
<b>Total</b>	<b>1,281</b>	<b>1,213</b>	<b>- 5.3</b>
City bike	632	599	- 5.3
Hybrid / tracking bike	205	148	- 27.8
EPAC	153	171	+ 11.8
Children / Juvenile	172	181	+ 5.3
Other	119	114	- 4.4
Market share by category (in %)	2009	2010	+ / -
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>0.0</b>
City bike	49.3%	49.4%	0.0
Hybrid / tracking bike	16.0%	12.2%	- 3.8
EPAC	11.9%	14.1%	+ 2.2
Children / Juvenile	13.4%	14.9%	+ 1.5
Other	9.3%	9.4%	+ 0.1
Average price by category (in €)	2009	2010	% +/-
<b>Total</b>	<b>726.00</b>	<b>745.00</b>	<b>+ 2.7</b>
City bike	559.00	573.00	+ 2.5
Hybrid / tracking bike	770.00	752.00	- 2.3
EPAC	1,947.00	1,928.00	- 1.0
Children / Juvenile	211.00	201.00	- 4.3
Other	710.00	731.00	- 3.0

## THE NETHERLANDS - BICYCLE PRODUCTION (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Production (x 1,000)	1,159	1,046	1,082	1,045	882	894	967	972	1,129	1,200	1,200
Evolution year/year-1 (%)		-9.75	3.44	-3.42	-15.60	1.36	8.17	0.52	16.15	6.29	0.00

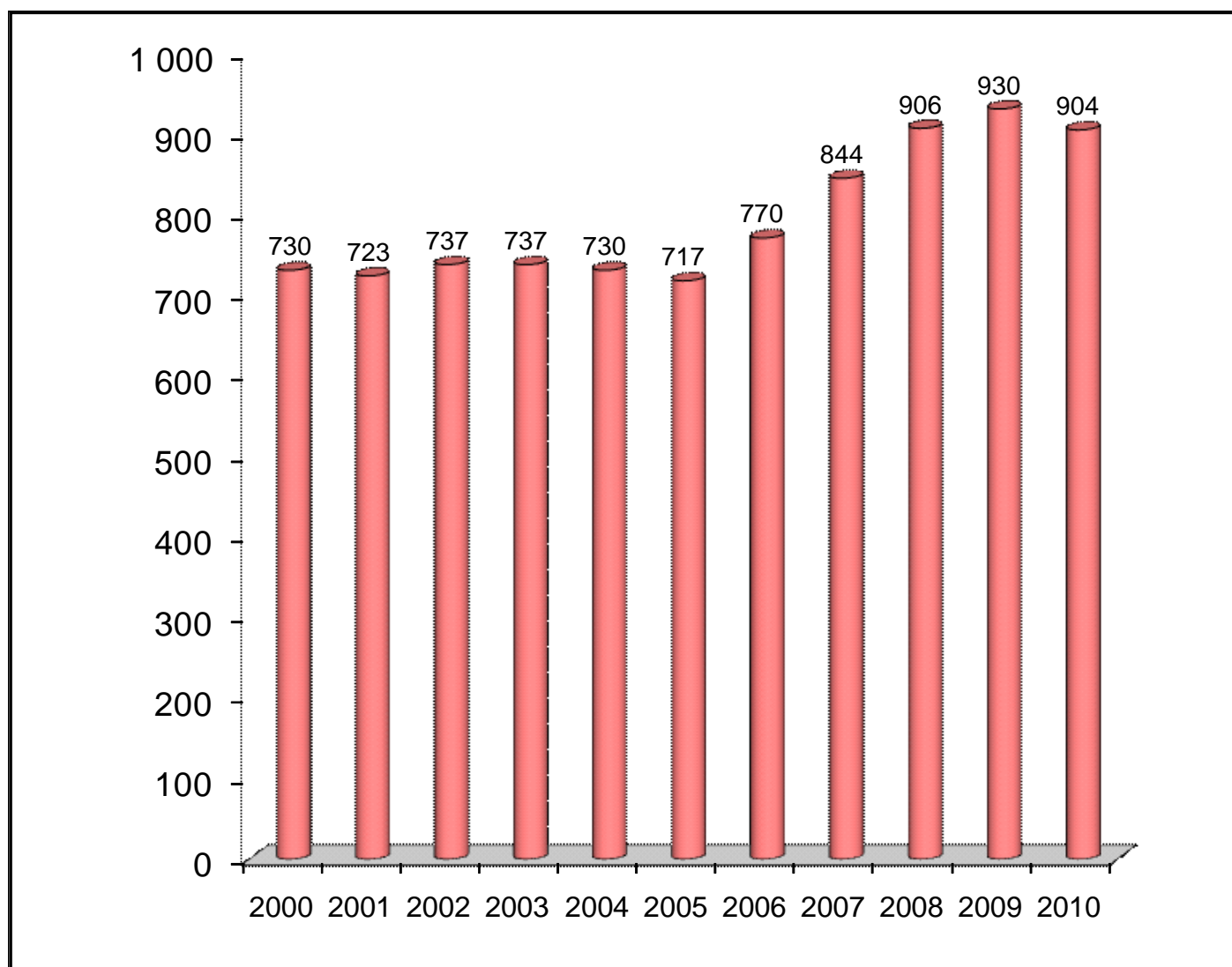
## THE NETHERLANDS - BICYCLE SALES (1,000 units) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (x 1,000)	1,517	1,365	1,324	1,324	1,250	1,239	1,323	1,400	1,388	1,281	1,213
Evolution year/year-1 (%)		-10.02	-3.00	0.00	-5.59	-0.88	6.78	5.82	-0.86	-7.71	-5.31

**Comments : SALES = SALES TO CONSUMERS**

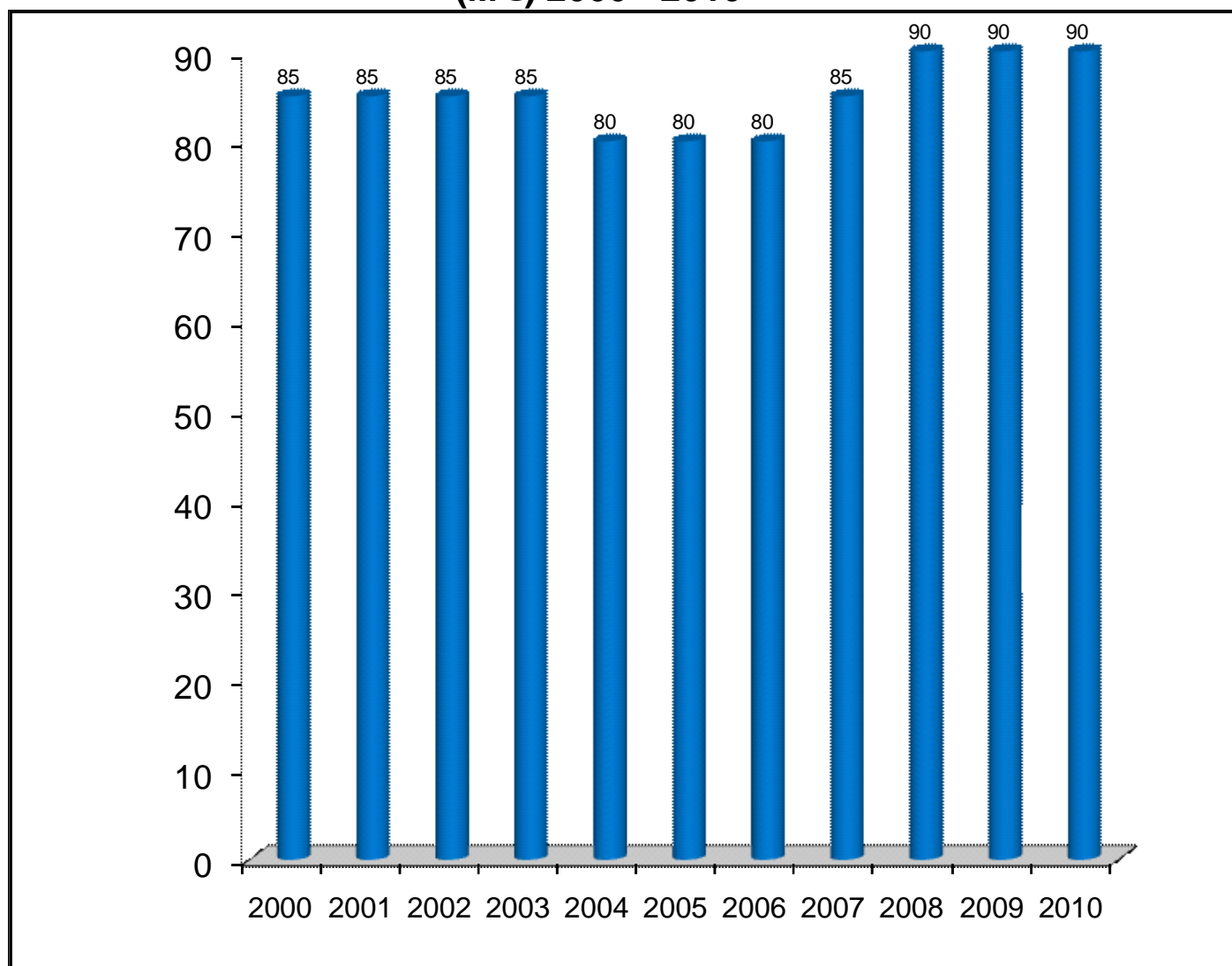
## THE NETHERLANDS - BICYCLE SALES (M€) 2000 – 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Sales (M€)	730	723	737	737	730	717	770	844	906	930	904
Evolution year/year-1 (%)		-0.96	1.94	0.00	-0.95	-1.78	7.39	9.61	7.35	2.65	-2.80

**Comments : SALES = SALES TO CONSUMERS INCLUDING VAT**

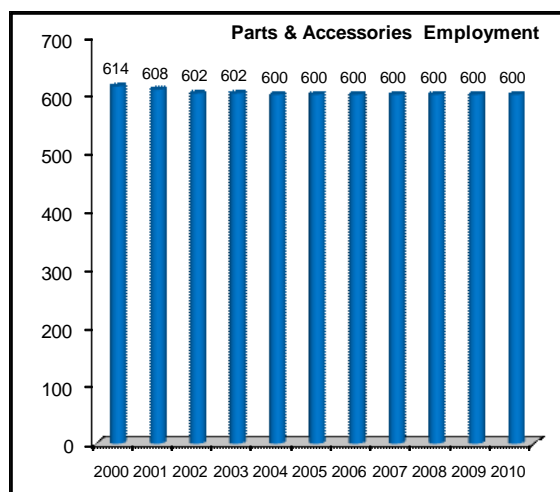
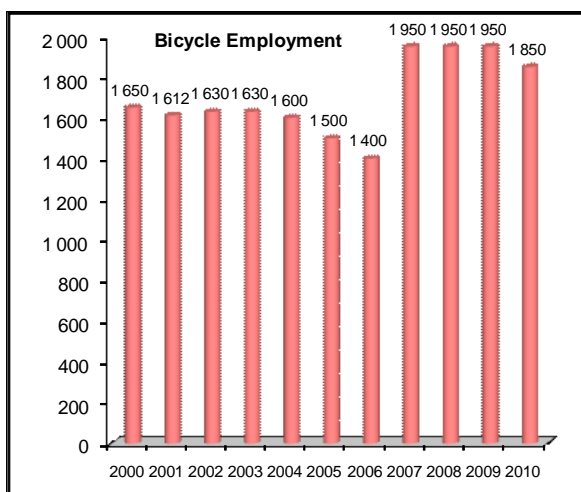
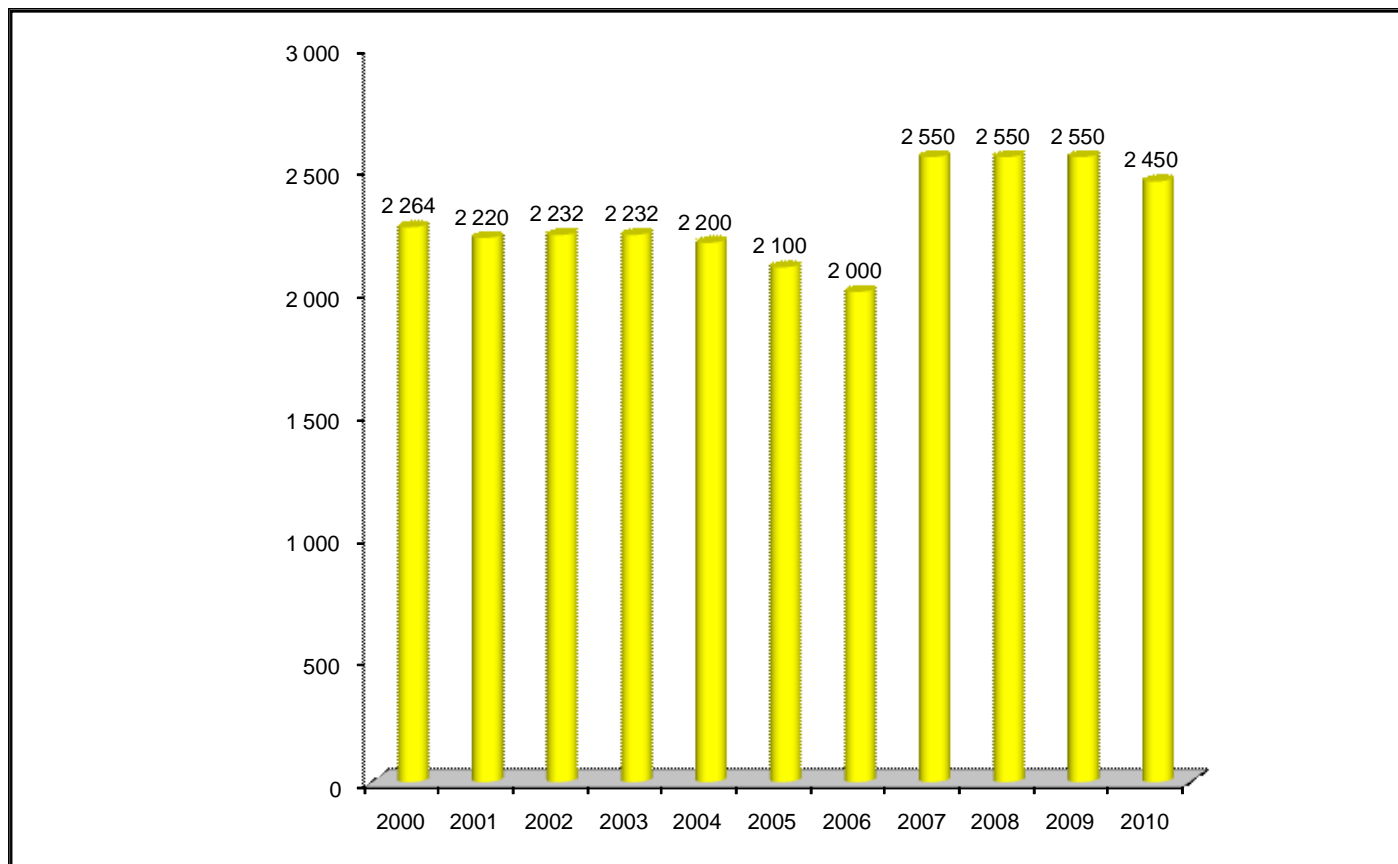
## THE NETHERLANDS - PARTS & ACCESSORIES PRODUCTION (M€) 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
P & A Production (M€)	85	85	85	85	80	80	80	85	90	90	90
Evolution year/year-1 (%)		0.00	0.00	0.00	-5.88	0.00	0.00	6.25	5.88	0.00	0.00

**Comments : VALUES EXCLUDING VAT**

## THE NETHERLANDS - BICYCLE EMPLOYMENT 2000 - 2010



Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Bicycle Employment	1,650	1,612	1,630	1,630	1,600	1,500	1,400	1,950	1,950	1,950	1,850
P & A Employment	614	608	602	602	600	600	600	600	600	600	600
<b>Total</b>	<b>2,264</b>	<b>2,220</b>	<b>2,232</b>	<b>2,232</b>	<b>2,200</b>	<b>2,100</b>	<b>2,000</b>	<b>2,550</b>	<b>2,550</b>	<b>2,550</b>	<b>2,450</b>